The Impact of Globalization on Adult and Higher Education

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Special Issue Editorial:
The Impact of Globalization for Adult Education and Higher Education

Mary Gene Saudelli and Dolana Mogadime
Guest Editors
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This special issue ‘The Impact of Globalization for Adult Education and Higher Education’ was inspired by Sharan Merriam’s visit in 2011 to Brock University during which she delivered the inaugural address in the Faculty of Education’s “Distinguished Speaker Lecture Series.” Her lecture was entitled, “Globalization: Challenges and Opportunities for Adult Education.” As the editors of this special issue, we sought manuscripts that considered the question: How does globalization play out within the practice of teaching and research in adult and higher education?

Several themes are present in the articles featured in this special issue. Transnational sites of oppressions are multifaceted whether they are based on the impact of multinational corporations, or global migrations in search of a better livelihood. Today’s globalized, interconnected, and financialized times bear consequences for adults who are deserving of education programs that are responsive to their diverse realities, which has a profound impact on adult and higher education. The tensions over the nature of what adult education is and the delivery of culturally responsive approaches that include indigenous concerns and ways of knowing are emphasized throughout the articles featured in this special issue.

The Special Issue Manuscripts

Roger Boshier presents a narrative study of an eminent educator Yao Zhongda, in “Mao Was My Neighbour: Yao Zhongda and the ‘Opening’ of Chinese Adult Education.” Yao was the Chief of the Bureau of Workers’ and Peasants Education. Regardless of the fact that Yao is an important figure in adult education to many foreigners, few in China are aware of him or his salience to adult education in China. Boshier’s paper captures some of the details of Yao’s biography from his voice, and reflects on what it means for 21st century China and adult education.

Amanda Benjamin, Melissa White, Mary MacKeracher, and Katie Stella investigate the state of adult education in New Brunswick, a Canadian province they identify as “have-not”. “The Impact of Globalization on Adult Education in a Have-Not Province” discusses the increasing unemployment rates and loss of long-established employment sources that New Brunswick is currently experiencing, which, combined with adults who are now in circumstances of having no clear employment direction has had a profound impact on adult education. They detail the shift the field has taken from an ethos of personal and social change toward a “neo-liberal skills agenda.”

Jennifer Sumner’s article “Eating As If It Really Matters: Teaching The Pedagogy of Food in the Age of Globalization” chronicles a very important movement for adult education and globalization: the relationship between adult education, globalization and food. Sumner presents the development and teaching of a course in adult education that focused on eating as a pedagogical act and the nature of food as an important piece of a global dialogue.

Michelle K. McGinn, Snežana Ratković and Charl C. Wolhuter explore the current trend for internationalization of higher educational institutions through a study of academics in 19 countries. “Global Connectedness and Global Migration: Insights From the International Changing Academic Profession Survey” highlights the differences in global connectedness for academics working in their countries of birth referred to as “national academics” as compared to academics who are working in countries where they were not born referred to as “immigrant academics”. These researchers found that participating academics demonstrated a high level of global connectedness in both their scholarship and their andragogy. Participants described their scholarship as “international in scope” and research collaborations with colleagues in other global contexts. However, the researchers also found that national academics were less globally connected than immigrant academics; thus leading the researchers to identify global migration by academics as a significant factor to internationalization of scholarship. This research highlights the significant internationalization contributions immigrant academics are making to their institutions both at home and abroad.

Jamie Magnusson’s article “Precarious Learning and Labour in Financialized Time” compels us to consider the current globalized economic regimes and relations of learning and labour, debt, and the global economics of new wars and political turmoil. Although the risks are devastating for “youth, indigenous, working class and racialized women,” currently there is little recognition of financialization for adult learners and in adult education. Magnusson’s paper presents a discussion of the implications of financialized times in our contemporary period and offers a framework for examining how global realities can be addressed in sites of adult and higher education.

Matthew A. Eichler and Robert C. Mizzi’s article “Negotiating the Confluence: Middle-Eastern, Immigrant, Sexual-Minority Men and Concerns for Learning and Identity” presents case study research of three immigrant men re-locating from the Middle East to the United States and Canada. This case study frames the experiences of these men as they negotiate issues of identity, integration to their new societies and citizenship, learning, unmet expectations, and the complexities of becoming involved in sexual-minority settings. The authors assert that educational and social adult education programs should address these complex needs and issues for immigrant adult learners.

This issue concludes with May Al Fartousi’s review Whose University Is It, Anyway? Power and Privilege on Gendered Terrain, edited by Anne Wagner, Sandra Acker, and Kimine Mayuzumi. Al Fartousi asserts that this book provides insight into equity issues in Canadian higher education. In a globalized world, an important query posed is: if equity can be achieved for all individuals but particularly those “whose identity is interwoven with gender, race, ethnicity, disability, social class, and religion and within various situational subjects (e.g., student, teaching assistants, faculty, and administrators) in a Canadian context.”

Together the articles in the special issue provide a different vantage point through which to examine questions of adult education for whom and why? They advocate strongly for the importance of redressing social, institutional and political systems that disadvantage adult learners. The Brock Education readership may gain insights into how researchers featured herein both demand for the advancement of issues germane to social action – concerns that have been at the forefront of the adult education field as well as question the field for its omissions with reference to the globalized realities that inform learners lived experiences. In so doing these articles simultaneously draws attention to serious gaps in the research literature and by extension contribute to filling the identified omissions.
A Conversation with Sharan Merriam: Globalization and Adult Education

Mary Gene Saudelli
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On September 22, 2011, Sharan Merriam visited Brock University to give a Distinguished Speaker Lecture entitled “Globalization: Challenges and Opportunities for Adult Education.” Based on her research about the future of adult education within a global context, Merriam’s lecture sets the tone for this special issue on the impact of globalization for adult education and higher education. Merriam (2010) unpacked the phenomenon of globalization, connected it to the knowledge economy, and situated it within a contemporary, political, social, cultural, and educational context. Merriam (2010) highlighted the need for consideration of the trends and trajectories in adult education related to globalization as "adult education does not occur in a vacuum" (p. 408). She emphasized the need to consider research on lifelong learning that has been impacted by global education. Merriam’s work further highlighted the need for the sharing of knowledge among international educators in a global context.

Subsequently, the authors of this article interviewed Merriam seeking to understand her background, how she became a specialist in adult education, her understanding of adult education as a field, and her perspective with respect to globalization and adult education. The ideas discussed in the interview led the editors to conceptualize this special issue entitled "The Impact of Globalization for Adult Education and Higher Education." This special issue seeks to explore new knowledge that considers the question: How does globalization play out within the practice of teaching adult and higher education in various adult educational contexts?

Sharan Merriam, Her Story, Her Beliefs, and Vision of Globalization and Adult Education

The focus of our interview involved three particular areas: we wanted to learn more of her background and what led her to adult education, we wanted to learn about her beliefs regarding adult education and her message to current and future adult educators, and we wanted to know her vision of adult education and the impact of globalization. We have summarized her discussions in that regard below.

Her Story

From the beginning of her career, Sharan Merriam has had a profound interest in international education. Merriam described her decision after college graduation to work with the Peace Corps, travelling to Afghanistan to teach boys English. Merriam’s Afghani students were from low socioeconomic backgrounds selected for the school where she taught because they were deemed "the brightest ones in the Province." Merriam was attracted to teach abroad, both out of a desire for the sheer adventure of living in an international context that was very different from
anything she had known but perhaps more importantly out of her sense of civic mindedness. Similar to Lovering’s (2012) identification of the characteristics inspiring international educators in their rationale to go abroad, Merriam reflected on the meaning of her decision:

At the same time, that sense of adventure might make some difference. So I guess that’s probably where I could trace that strain of interest throughout my career…Wanting to do something and being concerned with social issues. I guess that’s maybe what drew me to adult education because of its history of social action and then making a difference in people’s lives. (interview transcript)

Returning home to the United States, first teaching English to middle school children, Merriam’s new journey into adult education took multifaceted and interesting roads. Initially her work with adult learners involved supporting English language communication and writing skills among American civil service workers at a training center located in Trenton, New Jersey. Conducting workshops, the knowledge areas Merriam supported were: critical thinking in business writing as well as classes in memory, concentration and interviewing. Then changing institutional learning environments to teach at an adult education centre located at Trenton State College, Merriam stayed committed to supporting language skills development but with English as a Second Language adult learners. She worked with students to prepare them to, in her own words:

Take the GED, the high school diplomacy exam, or they were just basically learning to read or write in English. So you assessed them and whatever their needs were, you would sit with them and they would have their turn doing that. So I loved that, I was really enjoying that. These people that came in were so dedicated... (interview transcript).

Throughout this time, Merriam was raising her children and continuing her own education through graduate studies at Ohio University where she earned a Master’s degree in English Education. She literally “fell” into the academic field of Adult Education when seeking out a new specialization outside of English Education. As she well described it the affirmation of her interests happened through a “back door.” While facilitating workshops to adults, which she “loved” doing, she serendipitously discovered adult education as a field of study via an ad for a "doctorate in adult education" (interview transcript).This was an "AHA" moment for Merriam in which she could consolidate her prior experiences and draw meaning from the wider educational theories underpinning them. Studying with respected scholars such as John Elias and Gordon Darkenwald, Merriam’s work was acknowledged as noteworthy and publishable during the initial years of her doctoral studies. She went on to publish with Elias a book on *Philosophical Foundations of Adult Education* (1980). Both Elias and Darkenwald played a key mentoring role in Merriam's life when she was a young scholar. Merriam's scholarly work in the field of adult education is internationally recognized as influential and important.

**The Complexity of Adult Education**

In her discussion directly relating to the field of adult education, Merriam addressed questions about the multifaceted nature of adult education, its conceptualization as a distinct field, and its
marginalization within universities and society. Her responses are discussed below, grouped into two main themes that are also connected to her previous work: adult education as a diverse field and challenges to adult education. This section closes with Merriam’s advice to adult educators.

**Adult education as a diverse field.** There are multiple ways in which adult education is defined, approached, and conceived as a field. As in her own life-story, Merriam highlighted the variety of ways in which adult educators are introduced to the field of adult education, explaining that "all of us get into it through the back door" (interview transcript). Although the diversification of the field lends to its richness, adult educators have "had this problem forever: the identity issue of 'what is adult education? What is it?'" (interview transcript). People's backgrounds determine how they define adult education, because they "come at adult education from a particular angle" such as "literacy, adult basic education, or ESL,...so that's what you think adult ed is" (interview transcript). The same applies to "international work, so then you come at it from a community development perspective...or you might be in distance education, ....continuing higher education, or continuing professional education" as well as "union and labour education." There "will never be a single theory of adult learning powerful enough to capture the complexity of this phenomenon" (Merriam, 2001, p. 95).

The multifaceted nature of adult education has resulted in "multiple associations for each of these segments in the field" (interview transcript). Therefore, "it’s really hard to make this umbrella called adult education work" as it has "struggled...since...it consolidated as a field" (interview transcript). Although the "practice of adult education is thriving" (Merriam & Brockett, 2007, p. xvii, italics in original), "the profession of adult education has faced some challenges and even setbacks" (Merriam & Brockett, 2007, p. xvii, italics in original). For instance, in the United States\(^1\), despite many successes, there have also been significant difficulties "in efforts to maintain a thriving 'umbrella' adult education association" (Merriam & Brockett, 2007, p. 314), largely because "educators of adults tend to cluster around associations that meet the needs of their specific areas of practice" (p. 316).

Additionally, as the "vast majority of practitioners...don’t realize this is a field" with its own "history and literature and research," it’s "really hard for us to get funding from funding agencies because no one really understands" adult education (interview transcript). There is no "coherent structure because everybody has their own perspective and only a very small number of practitioners are in graduate programs and realize it is a field" (interview transcript). Indeed, "many educators of adults remain unaware that they are part of a cadre of thousands that constitutes the field of adult education" (Merriam & Brockett, 2007, p. ix).

There is a "contradiction when speaking of the field of adult education" (Merriam & Grace, 2011) in that "adult education programs are everywhere....[but] as a professional field of practice is nearly invisible" (p. xvii). There "has always been a colorful collage of various and sometimes competing components comprising adult education as a field of practice" (p. xvii). However, there are some similarities between perspectives. "Learning...is something human beings do throughout their lives" (p. xvii) and "adult education can be a positive force" (p. xvii). Additionally, "the thing that does cut across all the different components of the field is certain shared values [such as]...the respect for the adult learner,...the interest in facilitating

\(^{1}\) Canada has faced similar challenges, but currently has a robust national association, the Canadian Association for the Study of Adult Education (CASAE).
learning...and the valuing of adults' experiences" (interview transcript). It is "the focus on the adult learner [that] is...the central key that links all of these" (interview transcript), as connected to a "wholistically" (Merriam, 2001, p. 96) determined approach to individuals, the learning process (Merriam, 2001, p. 96, italics in original), and "the context...[in which] the learning occurs" (Merriam, 2001, p. 96). Merriam ponders the idea that perhaps a "move to the notion of lifelong learning...would be better... because then that would really put the focus on what we are all about and the values that we all share" as adult educators (interview transcript). The concept of lifelong learning has "opened up our thinking of learning as broader than what goes on at school" (Merriam, Caffarella, & Baumgartner, 2007, p. 49), even though the term has also unfortunately been used for "crass commercialization" (p. 49).

Challenges to adult education. Due to the complexity of the field, adult education faces challenges with respect to its positioning in faculties of education, the increasing presence of Human Resource Development (HRD), and a lack of overarching policies and funding opportunities. Merriam explains that most "colleges of education, don’t understand adult education. They think school-based. And everywhere I’ve been, that’s the case. And they just don’t... compute that there is a whole field out there" (interview transcript). There have been various arguments for adult education to align with or distance itself from "preadult education" as a way to address its marginalization, but there are concerns that adult education would lose its distinctiveness as well as its social action approach (Merriam & Brockett, 2007).

There are also "big tensions" (interview transcript) within the field itself, particularly with respect to Human Resource Development. HRD's "workplace profit driven, performance-based rubric is directly clashing [and] competing with... learning [focused on the] development of human potential, social commitment, social actions, [and] making lives better" (interview transcript). Merriam states that, "in all fairness, there is a growing movement in corporate-social responsibility [but]...how much of a real commitment is that? And how much of that is PR?" (interview transcript).

Merriam gave several examples of universities where a "social action adult education" focus is being displaced by "HRD folks" (interview transcript). Discussions are ongoing about changing department priorities, including making name changes that would centre on "organization development, not human development" (interview transcript). A government priority on "business and industry...[and] training" is resulting in universities changing adult education programs to "produce consultants and trainers" over social advocates (interview transcript). Although Merriam thinks "HRD has its place" (see Merriam & Brockett, 2007, for an in-depth discussion, including the ways in which HRD can engage in a societal critique), she is wary of how its behaviourist human capital tenets are "taking over" from a critical adult education approach (interview transcript). As she states in reference to any and all adult education contexts, "it is no longer a question of whether in adult learning situations we need to address issues of race, class, gender, culture, ethnicity, and sexual orientation but rather a question of how we should deal with these issues, the power dynamics involved, and so on" (Merriam, Caffarella, & Baumgartner, 2007, p. 430, italics in original).

In a country such as the United States (as well as Canada), the lack of a national policy on adult education is disconcerting and detrimental to learning. Funding is difficult to obtain, with disparate pots of money for "work force development... literacy...housing and urban development" or to "train people to be good stewards of their community, but it’s a little here

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and there, there is no umbrella, there is no national policy" so "it’s left to the states or individual organizations" (interview transcript). However, it does not need to be this way, as "in other countries there are national policies" such as Singapore and Malaysia (interview transcript).

A message to adult educators. Despite these challenges, adult education is a strong field with much to offer. Merriam emphasizes the need for practitioners to have "a critical questioning eye to their practice" (interview transcript). Questions that should be continually considered include: "Why are we doing it this way? How could we do it better? What are the assumptions we [are] ...working under here?" (interview transcript). It is important to "examine what you are doing and why are you doing it this way" and avoid "technicians just doing it according to some formula. Reflective practitioners [are]... what I would like to see" who will "challenge the system" (interview transcript). For instance, much of Merriam's work (i.e., Merriam & Associates, 2007) calls for educators to problematize the ways in which globalization and internationalization interact with learning, as well as to value and learn from non-western perspectives.

Her Vision of Globalization and Adult Education

Globalization offers tremendous opportunities and multiple challenges. When speaking of the impact of globalization and adult education, Merriam identified globalization as leading to better understandings of other conceptions of notions of learning and the nature of knowledge. She articulated that globalization offers the opportunity for reciprocity of knowledge mobilization through international adult learning relationships, and a challenge for adult educators is the complex role of language and globalization. Discussion of these ideas follow and are connected to the legacy of her work in adult education.

The nature of knowledge. The advent of globalization has provided opportunities to engage with new understandings in various contexts. Merriam believes this is enriching because we are "encountering people with all kinds of epistemological frameworks." She believes that we must encourage "valuing what each perspective has to offer" because "trying to work together on that can be good for everybody" (interview transcript). Merriam spoke of different ways to understand aspects of learning such as memory, questioning critical theory, conceptions of intellectual property, and dialogical learning that are culturally, religiously, and contextually oriented. This recognition has profound implications for how educators teach and relate with others. She emphasized the need to "decentre the privileged, Western perspective" as many other places have ways of being and ways of knowing that have "worked for them for eons" (interview transcript).

Merriam speaks to globalization as providing opportunities to reflect on what "counts" as knowledge and who "determines what 'counts'" (Merriam, 2007, p. 178) in contemporary adult education. In western contexts, knowledge is often characterized along positivistic frames of thought (Merriam, 2007; Nakashima & Roué, 2002). This is the knowledge privileged as worthy. However, there are other "epistemological frameworks [that] have lasted over the years. It worked in that culture" (interview transcript) and Merriam believes that it is crucial for all educators to recognize and value these conceptions of knowledge. Globalization has provided a mechanism for educators to consider how we understand the nature of knowledge.
In reflecting on what "counts" as knowledge and identity, Merriam commented on African, Asian and Indigenous conceptions of being and knowing as collectivist in orientation. Collectivist and interdependent models of identity provide opportunities to consider social place in a community. Merriam spoke of African and Asian understandings of identity as community based and making a connection to African proverbs and Confucianism (interview transcript). With issues pertaining to alienation and loneliness prevalent in many contexts but particularly identified as Western concerns (interview transcript), the notion of community identity disrupts understandings of these societal issues. In considering issues pertaining to collective efforts for social change that has occurred in various countries around the world, Merriam lauded the role of collective identity that is a historical and current ontological orientation in many international contexts. Further, Merriam identified global understandings of conceptions of community, identity and learning as important areas of exploration, research, and reflection in adult education.

Adult education and understandings of "who determines 'what counts'" is problematized with the advent of globalized educational programs. Merriam (2007) states "The hegemony of the Western 'scientific' perspective is also in evidence in the schools and universities of the non-Western world where Western textbooks, theories and research are valued over local or regional resources" (p. 12). This represents a concern as Merriam calls for adult educators to reexamine their roles as educators in order to continue to work toward inclusive and holistic approaches. Merriam (2007, 2010) calls for adult education approaches that honour storytelling, embodied knowing, community learning, and connections to the spiritual, which are some of the ways of knowing that adult educators can learn from and incorporate into their understandings of what "counts" as knowledge in all adult education contexts (Merriam, 2007, 2010; Merriam & Ntseane, 2008). Merriam’s body of work in the past decade has highlighted the roles of non-Western epistemologies as valuable in understanding the nature of knowledge.

**The complexity of language and adult education.** The complexities of language and adult education are emphasized through globalization, global communication, and the legacies of historical and contemporary colonization. Historically, colonization brought with it an educational system requiring the colonized to learn English, the language of the colonizer, with subsequent disastrous effects on the identity, traditions, and languages of the oppressed. This system of educational colonization continues to this day with the dominance of English as the language of technology, the internet, and organizations across the globe.

Merriam believes language and culture are interwoven and can be subjected to the effects of colonization particularly in relation to global education systems. She identifies that those in the academy are experiencing increasing pressure "to publish internationally [often in English] …. If I had to learn two languages it would be English and Mandarin" (interview transcript). Globally, schools, higher educational institutions, and business and governmental organizations use English as the language of communication, while indigenous and linguistically diverse languages are marginalized. Although many countries are now emphasizing a reclaiming of indigenous languages, and problematizing English as a global language, Merriam (2007) maintains that "part of the power of Western domination is linguistic" (p. 8).

Recognizing the complexity of global communication in English as a current lingua franca, Merriam cautions "that while English is a vehicle for communication with others in many different places that does not mean we have to impose our ways of doing things, our literature as
the most legitimate source." She asserts that "reciprocity – and valuing the orientations and epistemologies of peoples globally" (interview transcript) is crucial. Regardless of whether the recognized global language remains as English in the years to come, or becomes Mandarin or some other language, adult educators will be called upon to explore and reflect on the power of the language of communication in global relationships.

Final Thoughts

The field of adult education is complex with many opportunities and challenges. As an esteemed scholar in the field, Sharan Merriam has wisdom to contribute from her story, her discussions of the field of adult education, and her vision of the field. Her call to adult educators worldwide to reflect on their educational practices and understandings speaks to the need for all educators to engage in reciprocity of learning by valuing diverse epistemologies. Sharan Merriam, a distinguished speaker indeed.
References


Mao was My Neighbour: 
Yao Zhongda and the “Opening” of 
Chinese Adult Education

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Abstract

After Deng Xiaoping’s 1978 reform and opening, foreigners had a chance to see adult education in China. As a result, many met Yao Zhongda, Chief of the Bureau of Workers’ and Peasants Education. From 1921 onwards, adult education has been a vital corollary of Communist revolution. Although Yao’s biography was extremely relevant to what foreigners saw, few knew much about their host. Yao made enthusiastic responses to Roby Kidd’s efforts to “open” China to the Toronto-based International Council of Adult Education. By 2013, he was 88 years old. The primary purpose of this paper was to capture his biography and reflect on what it means for 21st century China. A secondary purpose was to alert Beijing scholars to the importance of this key actor in the colourful drama of globalization and adult education in China.

Key words: Chinese communism; revolutionary adult education; People’s Liberation Army; biography; family; International Council for Adult Education

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Not a Prophet in His Own Land

By 2013, Yao Zhongda was 88 years old, and still an outstanding figure in 20th century Chinese adult education. For many foreigners, Yao was their first contact with China. In contrast, the current inhabitants of the Zhongnanhai leadership compound (at the Forbidden City), along with Chinese university scholars, have been slow to manifest any interest in Yao. He is the Norman Bethune of China, better known abroad than at home. Near his Fengtai apartment building, pile drivers hammer at the pillars of China’s modernization. As the old soldier-turned-cadre ambles up dusty lanes to reach his favourite fruit market, he sees neighbourhood friends and acquaintances but is ignored by university scholars. Ageism explains part of the neglect, but what else?

There are three mostly incompatible social systems inside China. First, there is third world China, which depends upon family ties largely beyond official control. Third world China echoes rural life and was reinforced by communes and the hukou residence card system. Second, there is socialist China – the Maoist world built within danwei (former work units) where status depended upon rank. It exists in all cities, but particularly the Northeast. Third, there is newly-industrializing China, obsessed with markets, exports, money, and progress through competition. Power depends on guanxi (connections) lubricated by cash (Madsen, 2003).

University scholars, particularly in Beijing, are more affiliated with the third than either of the other two social systems. Because of his Hebei childhood, Yao understands life in third world China. He also has links to the other two but no strong affiliation with any, hence, the disjunction between his position and the interest of university scholars.

Chinese scholars are increasingly called upon to contribute to newly industrializing China and the quest for modernization. Most universities are being built on commercial imperatives. Although adult education has a very colourful history, it has increasingly been sidelined by training, human resource development (HRD), lifelong learning, or techno-zealotry wherein everyone learns on a computer. In addition, leading Chinese universities are playing in the global rankings game, endeavouring to become “world-class” and ruminating about how to build a learning ethos inside teacher centred pedagogy.

Most Chinese scholars are wedded to “scientific civilization” within an objectivist ontology, and not enthused by studying daily life and dilemmas of individual Chinese. Post-liberation literacy programs launched from Zhongnanhai, and the efforts of the Ministry of Education or Chinese Adult Education Association are part of a rapidly fading past. While fascinating for foreigners, they bear little relationship to so-called modernization or preoccupations of universities endeavouring to be world class.

Instead of adult education or literacy for citizenship, China now wants to build the biggest learning society in the world (Boshier & Huang, 2006). Where once there was innovative and very large-scale adult education, there are now unclear commitments to lifelong learning and attempts to be at the front of UNESCO efforts to develop learning city indicators. Hence, Yao does not attract much interest. But, for Canadian adult educators interested in “opening” China in the 1980s, he had an unrivalled view of adult education for revolution at the highest levels of the Chinese state.
Mutual Misunderstanding

Senior civil servants involved with adult education usually lurk at the periphery of political life. Yet, in Maoist China, adult education was considered the key pillar of revolution. In 1954, Yao Zhongda, the man at the apex of Chinese adult education, moved into the Zhongnanhai leadership compound in Beijing’s Forbidden City. Neighbours there included Premier Zhou Enlai and, a bit further away, Chairman Mao.

From 1949 until 1976, it was hazardous for Chinese to have contact with foreigners and adult education focussed on literacy, production, 5-year plans, and rooting out “rightists.” Mao died in 1976 and, starting in 1978, China opened to the world. At first, Yao watched what he said to foreigners. Later, there were frank exchanges and numerous trips abroad.

A visiting delegation was taken to Yao Zhongda, after calling on the Minster of Education. For the first time since 1949, Chinese could interact with foreigners (or “foreign devils” as they were labelled in the Mao era). During a May, 1978, question-and-answer session, a member of an Adult Education Association (USA) delegation asked if the Cultural Revolution had eliminated illiteracy. Imagine Yao’s horror when his interpreter said, “yes … illiteracy was eliminated by the Cultural Revolution” (Yao, Z.D., personal communication, December 10, 2009).

The careless (lying or terrified) interpreter was only a small manifestation of larger difficulties in relationships between China and the West. Chinese ignorance concerning foreigners was more than matched by naive anti-communism and fanciful ideas in the West. Even so, the Toronto-based International Council for Adult Education wanted to engage with China. This meant working with Yao Zhongda. But, who was this agent of Chinese adult education? According to birth order theory, being the 4th born, he was in a socially disadvantaged position. So how did a man like him come to have Mao Zedong as a neighbour?

Purposes of the Study

The purposes of this study were to:

- Create a narrative account of the socio-political biography of Yao Zhongda, a key figure in Maoist and post-Mao adult education in China.
- Explain how, despite war and revolution, the 4th born son of a Hebei farmer ascended to the top rungs of the Chinese civil service and, as such, became a key player in the globalization of Chinese adult education?

Methodology

The task here was to build a biography from interviews with Yao Zhongda, relatives, and friends. The first interviews were conducted over a ten-day period in a cold Beijing winter and spread out so as to avoid exhaustion. The author (and a Beijing interpreter) mostly alternated interview “on” and “off” days. During “on” days the author talked with Yao. During “off” days, the author made transcripts and created new questions. Copies of questions – written in English and Chinese –
were given to Yao before each session. The most recent interview was during the 18th Party Congress in December of 2012.

Interviews were conducting in Chinese and captured on a digital recorder. Then, recordings were emailed to Vancouver colleagues for safekeeping. Half the interviews were conducted in Yao’s 9th floor apartment in Beijing while others were in a quiet room at a neighbouring hotel. As work advanced, Yao produced photograph albums, papers, and maps.

This was the first time the author had set aside ten days to interview one person and, as Yao’s story unfolded, it felt like the right approach. Before this article was finalized, a Chinese version of the manuscript was read to him to which he made corrections. Then the article was read to him again. He does not agree with all the interpretive aspects of this article. But, throughout the process, Yao Zhongda, the author and a Beihang University doctoral graduate worked hard to get the biographical details correct. This study involved an interview methodology and document analysis – all located in an interpretivist perspective.

Farm Boy from Tangxian

How did a boy from a small revolutionary Hebei village survive a Japanese invasion, civil war, and communist revolution to become a key actor in Chinese adult education? In China, it is common to claim movements for change arise from the “thoughts” of the emperor – sage and otherwise – and rare to ascribe much importance to ordinary citizens. Hence, the biography is not well developed. But, in this case, Yao’s family background explains a lot.

Impoverished Village

Yao Zhongda was born in 1925 in Yaojiazuo village in Tangxian County, Hebei, a strategically important province with important battlegrounds and mountain passes (Hutchings, 2000). In the 1930s, Japanese invaders marched into Hebei to protect Manchukuo, their puppet state to the north. But, because of disorganization and shortages, Japanese control was restricted to railways and cities. Hence, communists administered territory behind Japanese lines.

Yaojiazuo village was just east of the Taihang Mountains - the site of ferocious battles between communist and Japanese soldiers. When Yao was a boy there were about 100 families in the village. The area would receive international attention after 1938 when Canadian surgeon Norman Bethune tended to wounded soldiers in communist armies. Bethune died in Yu, the landlord’s house at Huangshikou (Yellow Stone) village – about 100 kms from Yao’s place – at 5:20 a.m., 13th of November, 1939 and was buried at Zucheng in a remote part of Tangxian. Yao Zhongda does not recall meeting Bethune. But, living in a communist village in a war zone close to Japanese command posts and Wutai mountains gave life an unusual focus and edge.

The Yao farm consisted of 20 mu (about 3.29 acres). They farmed 13 mu (about 2.14 acres); the remaining 7 mu (about 1.15 acres) were leased to a tenant. They lived in a mud-brick (adobe) house that had been in the family for several generations. There were small rooms, no windows along the back and a larger room at the front. It was 20 miles to Fangshui, the nearest market town. Xiankou Township was closer but the way there was impeded by mountains.

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Hence, when Yao and his mother used a donkey to take persimmons to the market, they went to Fangshui.

The family had a pig, donkey, a cow, and laying hens who wandered through the house. They used a wood fire for cooking and there were unrelenting searches for firewood. Lighting was by candle. They had no irrigation and, despite Herculean efforts and the reasons explained by Friedman, Pickowicz, and Selden (1991), their land produced only meagre crops.

Family Background

Three notable (English language) books describing life in Hebei counties provide a firm foundation for understanding Yao’s childhood and the seductions of a revolutionary life. The first is Gamble’s (1954) 1926 to 1933 study of Tsin Hien, Hebei. The second is the analysis of Raoyang County (Friedman, Pickowicz, & Selden, 1991) which explained why children from old elites joined a resistance program committed to tax reform, fighting Japanese, and developing dignity and security for all. The third is Gatu (2008) who analyzed wartime battles and conditions in Hebei villages.

Yao’s grandfather was an elite member of Hebei society and, as a result, Yao Zhongda’s father received some formal education at an old-style private school. Han Xiuying, Yao’s mother, had bound feet and no formal education. Even so, her family also had cultural capital. She was deeply committed to education and a crucial force in Yao’s upbringing.

In Mao’s (1933) China there were five class labels – landlord, rich peasants, middle peasants (“old”, “new”, and “well-to-do”), poor peasants, and workers. Yao’s parents were middle “well-to-do peasants” and thus much worse off than Mao’s “rich peasant” parents. The label attached to families determined how they were treated during the Great Leap Forward where it was a catastrophe to be labelled a landlord.

Yao was 4th born in a six-child family. In 1940, at age 15 years, he was called home from school because his father was dying from heart disease. During interviews with the author he first dismissed the significance of his father’s death “because China was at war and there were many fatherless families” (Yao, Z.D., personal communication, December 10, 2009). But, when pressed, he talked at length (and in nuanced ways) about the impact of the missing father. With his dad gone, there were more chores, Yao’s mother had a bigger influence on her son and they developed a deep and enduring relationship. In addition, during teenage years, Zhongda increasingly depended on his big sister (Yao Chunyue).

Joys of School

Yao’s mother gave the children the option of school or farming. At age 8 years, Zhongda ambled over to the communist primary school less than 500 metres from their home. There were two classrooms and a room for the teacher residence. Teacher Wang, a man, would dart back and forth between two classrooms – each containing about ten pupils. Later Yao went to the higher primary school (Grades 5 & 6) in a village about 1 km from Yaojiazuo. There were no reading materials or electricity. If paper was needed, it had to be negotiated with the teacher. Nobody had
a book, map, or magazine. Information was slow to reach the village. Rumours were plentiful and dangerous.

Yao adored going to school and wrote neat Chinese characters. Handwriting is highly valued in China. He also liked mathematics and Chinese language and writing. Schools were controlled by the communist underground but Yao had no idea the Party was a special organization. Communism was just the way life was lived. He had a 1.5 metre long stick for military drill but, being not much higher than the weapon, did not look like a formidable fighter. He was 11 years old on 12th of December, 1936, when Chiang Kai-shek was kidnapped by his own men. The Xi’an Incident was underway and a nationalist-communist United Front would soon form to face Japanese invaders. He also vividly recalls the 7th July of 1937 Marco Polo Bridge Incident, which launched the Japanese invasion of China.

Living in Jin-Cha-Ji, he was at the centre of major battles but had a feeling Japanese armies would not have resources needed to subdue a large country like China. Even so, having to run into hills every time Japanese soldiers approached meant schooling was a hit-and-miss process. However, lurking in trees watching Japanese armies march through the village gave life an edge not experienced by youngsters in safer cities to the south. It also created a strong sense of solidarity amongst villagers. Although deadly serious, today, more than 70 years later, Yao giggles when he recalls hiding from Japanese soldiers (Yao, Z.D., personal communication, December 10, 2009).

**Warlord Army**

In 1936, his 18 year old brother (Yao Zhongxuan) left home, joined the warlord army of Yan Xishan, and mailed back a photo of himself (in uniform). For the next eight years, the family did not know if he was alive or dead. Big brother had moved to Yan’an in 1937 where he studied at the Marxist-Leninist Institute and learned to speak Russian. As Yao Zhongda recalled,

> I was at the North China University in Zhangjiakou. A train was arriving from Yan’an with troops going to the northeast. I had a feeling big brother was in the area and hung around the railway station. One day, just after a movie, I was on a street and twice heard my nickname. I turned and there was my brother. We were both very excited. I wanted to skip university and go with him. He wanted us to know he was alright. (Yao, Z.D., personal communication, December 10, 2009)

In 1938 the Japanese army passed through Yao’s village en route to battles in the Wutai Mountains. Villagers removed animals, grain, and themselves to the mountains. Yao watched Japanese marching through valleys below. Communist militiamen told them when it was safe to go home. Canadian surgeon Norman Bethune and New Zealand nurse Kathleen Hall were active in the area. The Wutai Mountains were the place where famed Jin-Cha-Ji army commander Nie Rongzhen built his reputation for “sudden attack and elusiveness” (Rigg, 1951, p. 6).

With his Yan’an pedigree, big brother rose to become a battalion commander responsible for 3000 men in the People’s Liberation Army. After 1949, he was a trusted Party official with very big responsibilities.
**Jin-Cha-Ji Revolutionary Middle School**

Behind Japanese lines, communists established schools and organs of government. After primary school, Yao Zhongda wrote an exam and was admitted to the Jin-Cha-Ji middle (secondary) school. There were no schoolrooms or books (except for those captured from nationalists), and teaching materials were printed on mimeograph machines.

The school owned one rifle (made in the famous Hanyang armoury in Wuhan) and, at night, students stood “guard duty” against Japanese. Yao excelled at mathematics, language, and writing. He liked breaking-down and reassembling the Hanyang rifle. Classes were held in village homes or on the ground. Yao and his classmates carried their belongings in a blanket. “It was a half-military life …. We would put down our packages, sit and classes began” (Yao, Z.D., personal communication, December 10, 2009).

Yao had only ever lived with his own family and considers middle school the “hardest period” of his life. However, it was a worthwhile introduction to collectivity which became a pillar of communist orthodoxy. Middle school was a “glorious” experience and he is shocked to hear some 21st century children do not like teachers and drop out of school (Yao, Z.D., personal communication, December 10, 2009).

**Northern China United University**

In 1943, millions of northern Chinese died when drought was followed by Japanese plundering grain (Friedman, Pickowicz, & Selden, 1991). In 1943, harvests amounted to almost nothing. In families with a lot of mouths to feed, ways had to be found to reduce the burden. In 1944, Yao was 19 and assigned to work a mimeograph machine at a half-work and half-study university created by the Communist Party. His job was to prepare and run stencils on the printing machine. He learned a lot from reading textbooks prior to making stencils, and when proof copies arrived, he had to correct errors. He also took courses on Marxist logic. This was a defining moment and he feels his adult education career started in the mimeograph shop at North China United University.

Japan surrendered the war with the United States on the 14th of August, 1945 after the atomic bombing of Hiroshima and Nagasaki. Mimeographed sheets were produced to spread the news. In north China, Lin Biao’s armies grabbed vast quantities of sophisticated Japanese weaponry. Peasant fighters would soon have something more lethal than a stick. At the time Yao was aware of secret meetings to which he was not invited. Because North China United University was communist, he assumed he was automatically a Party member. But, he was not in the Communist Party and a decision would soon be needed.

**People’s Liberation Army and Road to Beijing**

On 28th of August, 1945, Mao Zedong climbed into an aircraft for his first ever flight. The Chairman was leaving Yan’an bound for Chongqing and American-inspired negotiations to end
the conflict between nationalists and communists. After 46 days, negotiations failed and the Chinese would now fight each other.

Yao joined the Communist Party and People’s Liberation Army. The university staged a farewell ceremony where he rode a horse while wearing a red rose. He reached an army base in October 1945 where they had run out of uniforms for small men like him. The only thing available was an officer level uniform with four (rather than the normal two) pockets. As well, Yao was given jodhpurs – normally reserved for officers with a horse.

The short new soldier sauntered into the mess hall wearing the 4-pocket uniform. How could a newcomer like him get such a fast promotion? Even now, years after these events, he chuckles at consternation created by the uniform and rummages in the closet to find relevant photographs. Yet, what happened was congruent with Yao’s fast-developing duties in the People’s Liberation Army and Communist Party.

By July 1946, there was heavy fighting throughout China, and attempts to negotiate a truce were going nowhere. Communists and nationalists were in a final struggle for control. Yao was appointed Technical Secretary in the Political section, Department of Supplies, Jin-Cha-Ji military region. As an “intellectual” he was not a front-line fighter and normally 20 kilometres back from the front. He was well-organized and his job was to ensure needed supplies went where they were needed.

After two years in his first posting, Yao was transferred to the 18th regiment of the Jin-Cha-Ji army. The Officer in Charge was Xu Xiangqian and, while in the 18th regiment, Yao formed a lifelong relationship with Hu Yaobang – later to become a progressive Secretary-General of the Communist Party of China. After the Cultural Revolution, Hu and Yao were friends and Yao went to Hu’s Beijing home. This friendship strongly suggests Yao was in a “reformist” Party faction.

Beijing Bound

Yao Zhongda was at Baoji (near Xi’an) on 1st of October, 1949 when Mao went to Tiananmen to announce formation of the People’s Republic of China. Hu Yaobang represented the 18th regiment at Tiananmen festivities. But, orchestrating a revolution was not the same as running a government and communists soon faced complex dilemmas of victory (Brown & Pickowicz, 2007).

By 1950, Yao’s army days were over and he was sent to a foreign-owned petroleum company in Chongqing. He was 26 years old and delighted to meet and marry Wu Zhezhao, a history graduate from the Southwest Women’s University. In 1981, his wife from Chongqing died of myocardial infarction and Yao married Zhang Dingfang, a classmate from middle school in Jin-Cha-Ji.

In 1953, at age 28 years, he was appointed Section Chief, Bureau of Culture and Education for Cadres in the central government. He got this job because he was politically reliable, a good organizer, and had an irrepressible enthusiasm for learning and education. The task was to persuade even illiterate officials to learn something. Yao had to research the situation and felt most adult educators had their “feet on the ground.” This contrasted with worrying
developments in Beijing where an anti-rightist campaign illuminated hazards on the road ahead (Yao, Z.D., personal communication, December 10, 2009).

At this time, most Beijing cadres were much older than him and Yao was critical of the way Mao attacked intellectuals. He found the Chairman’s stress on continuous struggle not congruent with the utopian purposes of communist revolution. Like Hu Yaobang, Zhongda identified more with humanistic forms of communism. Having witnessed too many campaigns, he watched what he said and tried to avoid situations where the task was to humiliate or hurt others.

**Moving in with Mao**

In 1953, Yao became Chief of the Bureau of Workers’ and Peasants Education in the Ministry of Education. Now aged 28 years, his wife and baby daughter moved with him into the Zhongnanhai leadership compound. Zhongnanhai is adjacent to the Forbidden City and ordinary citizens cannot go there. Few people (Chinese or foreign) have seen inside. Farms throughout China produced food for those living there. Tasters screened what Mao ate.

Within Zhongnanhai there were three sections divided according to their function. Mao lived in District No.1. Yao Zhongda lived and worked in the No. 3 district. His neighbour was Premier Zhou Enlai who resided and worked in the same facility about 100 metres from Yao’s office. Crossing from one district to another required a pass.

Inside Zhongnanhai, Yao and his wife were not living like emperors. They were assigned only one room of less than 12 square metres. There was no space for daughter Yao Lili so she lived with a nanny in another section. There was no kitchen and dining halls for meals. In the No. 3 district one dining hall was for ordinary cadres and the nanny who minded Yao Lili went there. The other was for mid-level cadres like Yao. His wife worked in the Ministry of Commerce and also ate her meals there.

Each district had its own events and, at Saturday night movies, Yao would find himself sitting near Premier Zhou Enlai. Zhou’s secretary and security guard sat on either side of the Premier. Mao retained his privacy by rarely leaving No. 1 district.

Illiteracy was an enormous impediment to building “new China” and a first priority was to produce books. In 1956, Beijing established a National Council for the Eradication of Illiteracy headed by the 4th Army General Chen Yi. One slogan was “one thousand teachers, ten thousand learners.” Another said, “march to science and civilization.” But anti-rightist campaigns drained energy and talent and, for most of the 1950s, teachers and intellectuals were on the defensive. Nevertheless, Yao and colleagues at Zhongnanhai spared no effort to stimulate literacy learning. It was an extraordinary situation. China had been at war for 30 years, many people were illiterate, there was only rudimentary healthcare and, not long after announcing creation of the People’s Republic, Mao joined another war in Korea. In this context, it would be an uphill battle to launch creative forms of adult education.

In December, 1955 Yao was reassigned to a job at the Ministry of Education outside Zhongnanhai. His new job involved preparation and distribution of reading materials and textbooks to different regions. Peasants were required to learn 500 and workers 2000 Chinese characters. All regions needed literacy organizations. But rural citizens did not like being cajoled
into literacy programs only loosely linked to farm life and too many older people considered themselves incapable of learning. This “would make the teacher angry,” said Yao with a chuckle (Yao, Z.D., personal communication, December 10, 2009).

Between 1949 and 1956, adult education was a fundamental pillar of government policy. Hence, thousands of spare time middle (secondary) schools were built, factories created study centres, and mimeograph machines churned out materials. It was the widespread embrace of learning in farms, factories, and other nonformal settings that distinguished Chinese adult education from elsewhere. Yao needed to study the situation in regions and often left Beijing to do sociological investigations (e.g., Yao, 1981). Beijing life was filled with intrigue but, as a former farm boy, Yao enjoyed forays into the countryside.

**Catastrophic Great Leap Forward**

Becker (1996) claimed 30 million died from famine induced by the 1958 to 1960 plan to establish communism overnight and surpass the U.S. and U.K. in steel production. Jung and Halliday (2005) said the death toll was “close to 38 million” (p. 438). During the Great Leap Forward, private land was collectivized. Instead of tending land, citizens were required to build (more than 600,000) steel furnaces which produced mostly useless lumps of metal.

In April, 1958 there was a trial abolition of private plots and joining together of 27 Henan cooperatives into a huge commune of nearly 10,000 households. Because of widespread famine and crop failures, there were no new adult education initiatives from 1958 to 1960. Even so, in 1961, Yao was trying to promote literacy in Anhui but saw farmers sitting in fields. Emaciated and starving, they had no energy for work and did only a “bare minimum” to qualify for work points. They had a “vacant expression, suffered from depression and were not interested in adult education” (Yao, Z.D., personal communication, December 10, 2009).

Anhui was in crisis and eventually discarded the central tenet of the Great Leap – the complete public ownership of land. Mao accused Anhui officials of turning into capitalists (Becker, 1996, p. 147), and Zeng Xisheng, the Secretary of the Anhui Provincial Party Committee, was denounced. Yao had gone to Anhui to investigate adult education and literacy “but the masses needed food and had no interest in education” (Yao, Z.D., personal communication, April 8th, 2010). Returning to Beijing, he was having doubts about Mao’s emphasis on turmoil resolved to see things with his own eyes. He would soon face additional challenges and worries.

**Big Brother Becomes a Right-Opportunist**

At one time, Yao’s big brother was the Deputy Political Commissar of Nanyuan airport. In 1937, he had studied Russian at the Yan’an Marxist-Leninist Institute. Before the Great Leap Forward, because he spoke Russian, big brother was sent north to supervise construction of a Russian-funded military airport in Jilin. At the time there were 56 Russian-funded infrastructure programs underway in China. But when the Great Leap Forward was launched, Yao’s brother was told to make steel.
Yao Zhongxuan had grave doubts about amateur steel making and, with considerable courage, ignored steel making and continued building the airport. He had disobeyed Chairman Mao’s order. Although a man of character (Yao, Z.D., personal communication, April 8th, 2010) big brother was soon labelled a right-opportunist.

Later, big brother’s 1930s affiliation with warlord Yan Xishan would help famed army commander Bo Yibo expedite Zhongxuan’s rehabilitation. Bo Yibo had represented the communist side in the Yan Xishan warlord army and knew Yao’s brother from that time. But, it was always a serious matter to defy Mao and big brother never again had a top position in the government or Communist Party. In some ways he and the rest of the Yao family got off lightly. As Becker (1996) noted “to be labelled a right-opportunist was in some places tantamount to receiving a death sentence” (p. 141).

Bo Yibo – who helped Yao’s big brother – was father of Bo Xilai – who, in 2012, in the biggest Chinese political upheaval since the 1989 Tiananmen massacre, was purged from the Party and his high-level position in Chongqing. As a princeling (i.e., son of an admired former leader) people expected Bo Xilai to ascend to high office. At one time it was Bo Xilai (not Xi Jinping) who was favoured for the top job as President of the People’s Republic of China. Instead, his wife got a life sentence for murder. Bo Xilai was expelled from the Party, faced criminal prosecutors, and has an uncertain future.

By June 2013, China’s President Xi Jinping was giving few hints concerning the future of Bo Xilai. Yao Zhongda felt Xilai lacked the moral fibre of his father. For him, the Party investigation of Bo Xilai will yield the correct outcome (Yao, Z.D., personal communication, December 10, 2012). But what matters here are ways the refusal of big brother to make steel provided evidence for the Yao family being talented and rebellious. Eventually, Yao Zhongxuan was “rehabilitated” and rewarded for constructing the airport. Yao Zhongda chuckles when he tells this story and is very proud of big brother, the right-opportunist who defied Chairman Mao (Yao, Z.D., personal communication, December 10, 2009).

After Mao’s 1959 purge of right-opportunist Peng Dehuai on Mount Lu (Lushan), the Communist Party was in turmoil. In 1960, Yao Zhongda was transferred to the Office of Culture and Education in the State Council (equivalent to the cabinet in a Westminster-style parliamentary democracy). Chastened by the challenge to his authority during the Lushan plenum, Mao decided to eliminate threats to his leadership. The ten years of chaos – the so-called Cultural Revolution – would soon begin. Nobody could escape its madness and it would only be a matter of time before family life would be torpedoed and Yao Zhongda sent for reeducation in the countryside. Even the high-level State Council would be “rectified.”

Cultural Revolution

During the 1966 to 1976 Cultural Revolution, Yao’s bosses at the State Council were labeled capitalist roaders. As demonstrated when Madame Li Li of the Shanghai Education Commission was denounced and had her hair pulled, being a high-level adult educator offered no protection from cruelty, delinquency, and thuggery (see Boshier & Huang, 2009).

In 1966, there were massive Nuremberg-style rallies at Tiananmen. On the 18th of August, 1966, a million teachers and students converged on the famous square. During this six-
hour long event a female Red Guard put an armband on Mao, thus “obtaining his imprimatur” (MacFarquhar & Schoenals, 2006, p. 108). On 31st of August, 1966, there was another million-person rally at Tiananmen where Yao Zhongda took “red scarf young pioneers” upstairs to meet Mao. At the top of the stairs Zhou Enlai shook hands and welcomed each Red Guard. Mao’s wife (the actress Jiang Qing) was master of ceremonies and, according to a biographer, enjoyed the drama of massive Red Guard rallies. “For the rootless one, always aspiring but often slighted … it was exciting” (Terrill, 1984, p. 257).

Despite having lived nearby in Zhongnanhai, Yao had not previously met Chairman Mao face-to-face until 31st of August, 1966, at Tiananmen. “I was just doing my job,” said Yao who stood within one metre of Mao and, with a roll of the eyes and chuckle, acidly noted Lin Biao and the overweight Chairman took the elevator (lift) while Liu Shaoqi, Zhou Enlai and Red Guards all climbed stairs. Yao was not impressed with the health of leaders on 31st of August, 1966. But, for Red Guards, seeing Mao was like going to heaven (Yao, Z.D., personal communication, December 10, 2009).

Between August-September, 1966, Red Guards murdered 1,772 Beijing residents and the Minister of Police Xie Fuzhi said “bad persons are bad, so if they are beaten to death it is no big deal” (MacFarquhar & Schoenals, 2006, pp. 124-125). After a rally on 1st of October, 1966, Mao insisted on motoring through crowds. Chaos ensured and ten people were trampled to death (MacFarquhar & Schoenals, 2006). But, by 26th of November, 1966, the date of the eighth and last rally, Mao had stood before 26 million Red Guards. Chairman Mao inspects the Red Guards, the first of seven film documentaries on rallies at Tiananmen, was watched by over 100 million people (Clark, 2008).

In December 1968, Yao and other State Council employees were sent to Ningxia for reeducation. Ningxia is a remote border region north of Gansu. Imperial, Republican, and Communist governments have all used border regions to banish miscreants and, during Mao’s anti-rightist campaign, many intellectuals were sentenced to “reform through labour” (laodong gaizao) or “ideological remoulding” (sixiang gaizao) in Ningxia and other parts of the wilderness. From late 1957 to early 1958, more than 300,000 rightists and right-opportunists were hauled off to border regions (Wang, 2007). Zhang (1994), in his autobiography Grass Soup, vividly described life in Ningxia labour camps.

Yao and other State Council employees were dropped into a former prison farm on Helan Mountain. His wife was sent to a cadres school in Henan province. Their son (Yao Xiaojun) was left with big sister in Beijing. Yao Lili, their daughter, was sent for reeducation in Neimeng (Inner Mongolia), which is described in the worrying but extraordinary autobiography by Ma (1995). The Yao family was now fractured and, for Zhongda, it would be four years before he would see the city again.

Yao did not consider reeducation on Helan Mountain a complete waste of time. In several ways it was less dangerous than the madness of Beijing. Yao rode horses and herded stock. If he got animals onto grazing grounds early, he could fish in a river. Unlike Tangxian, Ningxia had irrigation and grew rice. Yao worried about communism but did not ditch the Party. When he had “doubts” and worries, they were “temporary.” Even now, he follows the Party line on Mao. The Chairman was correct 70% and wrong 30% of the time (Yao, Z.D., personal communication, December 10, 2009).
On 21 of February, 1972 when Richard Nixon swooped into the vastness of Beijing the city was cold and drab. In the Ningxia labour camp, there were no newspapers or radios. Inmates only heard about the U.S. President after his plane departed. Yao and comrades had not missed much because only two members of the Politburo – other than Mao and Zhou – spoke to the Americans.

Untold millions of Chinese citizens were killed or committed suicide because of the Cultural Revolution. According to Mao’s interpreter Ji Chaozhu (2008) “red guards, some as young as thirteen, were responsible for the beating death of one person on every block in Beijing” (p. 226). There has never been an explanation or apology from the Party and, as archives are pried open, Cultural Revolution history is only now being written (e.g., Clark, 2008; Esherwick, Pickowicz, & Walder, 2006; MacFarquhar & Schoenals, 2006).

The first Red Guard cohorts contained numerous sons and daughters of high officials. Older role models and the excitement of rebellion misled immature young people. Instead of truth and reconciliation, the government opted for amnesia. Yao believes it will take “several generations” to heal wounds left from the Cultural Revolution (Yao, Z.D., personal communication, December 10, 2009).

In the mid-1970s, Mao was suffering from motor neur on (Lou Gehrig’s) disease. On 9th of September, 1976, Yao was in Shijiazhuang when news of the Chairman’s death arrived and “unlike others, I did not cry,” he said. From 1959 onwards, Yao had worried about the direction of the revolution and contrasts events surrounding the death of Mao and fall of the gang-of-four with the genuineness of grief stemming from the passing of Zhou Enlai and Hu Yaobang (Yao, Z.D., personal communication, December 10, 2009).

Foreign Devils Looking Over the Wall

In 1977, Deng Xiaoping told a meeting of educational leaders to “speak-up … you are over-cautious and afraid of making mistakes … you should work freely and boldly, and think independently instead of always looking over your shoulder” (Deng, 1977, p. 82). Citizens had heard this before. There were (and still are) very good reasons why people looked over their shoulder but, by the early 1980s, citizens were developing confidence in the fact reform and opening was not another Hundred Flowers fiasco.

After continuously blaming foreign devils for 100 years of humiliation, China was going to play on a global stage. New teaching techniques were needed and burgeoning radio and TV universities had to do more than scroll text over a screen. Illiteracy was still a problem, teaching techniques were primitive, and healthcare almost non-existent. Too many books were destroyed in the Cultural Revolution.

The 1978 Democracy Wall was not far from Yao’s office, but he was uneasy about democracy activists. The most famous poster claimed democracy should be the “5th modernization.” Yao urged workplace comrades not to get swept along in the excitement. Colleagues went out to read the posters, but Yao stayed clear. “We had suffered deeply from the Cultural Revolution and did not need more tumult,” he said (Yao, Z.D., personal communication, April 9th, 2010).
Since 1949, it had been dangerous to consort with foreigners, and Yao’s boss was under suspicion because his son married a German and his daughter hooked up with a Russian. During the Cultural Revolution, high officials were persecuted because of the romantic inclinations of their children. Yet, in 1978, Deng said China needed ideas from abroad. Hence, in March of 1974, 25 Canadians visited China under the auspices of the Canadian Association for Adult Education. They went to Guangzhou, Shanghai, Wuxi, and Nanjing but not Beijing. Their reports – in a special issue of *Convergence* (1974, Vol. VII, No. 3) suggest Chinese minders did a good job showing only the positive side of China. The Adult Education Association (USA) arrived in 1978 with a delegation led by Herb Hunsaker. Capitalist running dogs and imperialist lackeys were now waiting in Yao’s outer office. In the West, China trips were suddenly popular and hordes of foreign devil educators jostled for attention in China.

Foreign delegations would typically call on the Minister, be taken to Yao Zhongda, and then to farms, factories, a TV university or community centre. In 1978, Yao was working as Deputy Chief of the Department of Adult Education in the Ministry of Education, and as Secretary-General of the Chinese Adult Education Association. Having lived through many campaigns and movements and experienced reeducation in the countryside, he was reluctant to say much to foreigners. “At first, I was conservative and careful,” he said (Yao, Z.D., personal communication, December 10, 2009). But, after seeing 40 delegations, friendships developed, there were frank exchanges, and Yao enjoyed himself.

The International Council for Adult Education had been founded in 1972 but was unable to penetrate the Middle Kingdom. With Deng calling for reform and opening, in Toronto, Roby Kidd sensed the time had arrived. Roby Kidd and Tanzanian Paul Mhaiki went to Beijing in May 1978 looking for Yao. The visitors found China in a “sober mood of self examination” (Kidd, 1978) but open for exchange. Kidd (1978) praised the “warmth and humanity of Chinese colleagues,” and pressed Yao Zhongda to prepare reports and participate in events outside China. But, with reform and opening an untested novelty and memories of the Hundred Flowers campaign and Cultural Revolution still vivid, Yao had to be careful. Five years passed before China joined the International Council for Adult Education in 1983.

**The 1984 Shanghai Symposium**

The mid-1980s was a time of unprecedented openness and innovation in China. In 1984, Budd Hall was Secretary-General and Chris Duke Associate Secretary-General of the International Council for Adult Education. Duke was handed the “China file” and, working with Charles Wong of Hong Kong, tasked to engage with China. What was needed was the ability to turn pleasantries into commitments.

Yao had visited the USA in 1980. Affluence in other parts of the world was a reminder of poverty at home. He states:

> When I was 15 years old I joined the resistance movement … education was traditional … based on Marxism and Stalinism. Thus, for a long time, imbued with these ideologies one becomes convinced … capitalism is bad and … communism good. After being out and
looking at different places one realizes this is far from being so … each side has its own assets and deficiencies and there is a need to learn and cooperate. (Yao, 1994, p. 7)

The 1984 Shanghai symposium on adult education was a resounding success and opened doors for Chinese and western participants (Boshier & Huang, 2005; Duke, 1987). Most foreigners were making their first trip to China and local delegates had never interacted with foreigners in such a sustained and informal way. Many group photographs were taken – most showing Yao in the front row with his name tag pinned to the left! At age 88, Yao can still name most of those in the group photos. In significant ways, 1984 was the year globalization landed on Chinese adult education. Foreigners went to places off the tourist trail and started seeing authentic Chinese adult education and learners.

Yao left the civil service in 1987. He lives on the 9th floor of an apartment building for retired cadres and has five albums of photographs mostly taken at adult education events. He also has ten volumes of a diary he started writing in 1959. It is an extraordinary document listing everything he has ever bought and the amount paid. His writing is as neat now as it was at school in Tangxian. He does not have a computer and is astonished to learn a foreigner would endure Beijing winters just to talk to him. He need not worry about Facebook and Twitter. Both are banned in China.

Globalized Modernity

As noted at the outset, Yao is not a prophet in his own land. For modern “leaders” tales of rural hardship or ill-fitting army uniforms are an embarrassing reminder of a primitive past and not relevant to science, modernization or being world class. Hence, Chinese graduate students would be hard-pressed to locate Yao’s life in larger stories about rural life, family, war, learning, and revolution.

In a world of Internet chatting, texting, and Kentucky Fried Chicken, delving into the theatrics of Chinese adult education is not a priority. This is particularly the case amongst pragmatic graduate students destabilized by the fact there is no longer a danwei (work unit) to find them a job. Yao is far removed from the technocratic preoccupations of business-oriented professors and their students. However, just as Red Star Over China (Snow, 1938) educated Chinese about their own revolution, the fact Yao is written about in foreign journals could spark interest in other adult education reds under the bed.

Chinese now enjoy more openness and personal freedom than in the Mao era. Yet, there will be no truly modern China until more people find their voices. Today’s scholar-officials could learn a lot from adult educators like Yao Zhongda.
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The Impact of Globalization on Adult Education in a Have-Not Province

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Abstract

This study examines the state of contemporary adult education in New Brunswick. New Brunswick is currently experiencing an increase in unemployment as well as the loss of traditional employment bases. Concurrently, there are greater numbers of adults who are finding themselves with no clear employment direction. One of the places they are ending up is in formal and non-formal adult education programs. Our belief is that the purpose of adult education in the province of New Brunswick has undergone a shift, moving away from an ethic of adult education for personal, social, and political change towards a neo-liberal skills agenda.

Key words: knowledge economy, role of government, globalized labour market, change

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Introduction

Many prominent writers and thinkers in the field of adult education claim that there has been a shift in the focus of adult education over recent years. We have moved away from an ethos of personal and social development towards a focus more interested in skill development and knowledge acquisition. This shift in focus mirrors a general political shift towards neoliberalism. This article reports on the findings of research undertaken to consider the extent to which such a shift has impacted adult education programs in the province of New Brunswick. The article provides a general overview of adult education in the context of neo-liberal politics and the knowledge economy. We then present our findings of this research, an analysis of those findings, and conclude with a discussion of the implications of those findings.

Education is commonly viewed as a panacea for social and economic problems. This is particularly so in an era of globalization and the knowledge economy. In such an environment, governments, international organizations, and industry place heavy emphasis on the importance of education and training for economic development. The focus on training is particularly strong in the context of the ‘new’ or ‘knowledge’ economy. Theorists, too, emphasize the need for a well-trained population with regard to economic development. According to the Organization for Economic Co-Operation and Development (OECD) (as cited in Rubenson & Beddie, 2004), “education is becoming less distinct from the economy” (p. 154).

The ability to participate and compete in the global market forms the foundation of many domestic policy decisions, particularly those related to education, economic development, and the labour market. The extent to which education and training are seen as the key to successful economic development and participation in the global economy is amply evident in even a cursory glance at the documentation of many national and sub-national level governments as well as international organizations and the literature. Discussions of the knowledge economy are rife with reference to training and education as the key to participation in the global economy. Human Resources and Skills Development Canada (HRSDC) in its 2002 publication, “Knowledge Matters: Skills and Learning for Canadians: Canada’s Innovation Strategy”, reports, “Countries that succeed in the 21st century will be those with citizens who are creative, adaptable and skilled” (p. 5). The belief in the relationship between education, training, and economic development is pervasive. Ashton and Green (1996) write, “In some cases, this link is conceived in quite simple terms: conventional wisdom has emerged wherein ‘better’ education or training is assumed to lead automatically to improved economic performance” (p. 11). Coucherne (n.d.) writes:

The most exciting feature of this new era … is that it is privileging knowledge and human capital in much the same manner as the Industrial Revolution privileged physical capital. As such, knowledge and human capital are not only at the leading edge of international competitiveness and wealth creation, they are also the drivers for sustainable growth and productivity enhancement (p. 1).

The assumption, then, is that an educated and trained population, in and of itself, will lead to economic development.

Though there have been some recent signs of a re-appreciation of the relationship between adult education, social justice, and civil society, the predominant view of adult education and lifelong learning remains geared to economic development. Despite the fact that
there have been claims made that lifelong learning is concerned with more than economic gain
(Walters, 2000), education, and, most especially post-compulsory training, serves as a means for
individuals and nations to participate in the global, knowledge economy. This approach has been
strongly criticized in the literature in recent years (see, e.g., Cruikshank, 2006, 2008; Field, 2006;
Jarvis, 2007) for its reliance on human capital theory (itself heavily criticized in recent years) and
as a tool to further the neo-liberal agenda (White, 2004). As Esland and Ahier (1999) write:

At the level of rhetoric, at least, education and training policy continues to play an
important role in sustaining the ideological commitment to the neo-liberal concept of
globalization, largely because it has now become the default institution for nurturing the
psychological conditions necessary for ‘competitiveness’. The notion that in order to
compete in the global economy, the modern nation state requires a highly trained and
‘flexible’ workforce in which knowledge- and people-based skills form the basis of a
‘self-perpetuating learning society’ (FEFC, 1997) has become the sine qua non of the age
(pp. 2-3).

Regardless of the inherent problems of a knowledge economy – the marginalization of
those not in a position to take advantage of it, be that for social or economic reasons – it is our
belief that the over-emphasis on skills development has supplanted some of the original core
ideals of adult education – personal development and social justice.

The Context

New Brunswick is currently a have-not province, marked by increasing unemployment and loss
of traditional employment bases. The national unemployment rate in Canada currently hovers at
7.4%. In New Brunswick this figure is closer to 10.4% overall, with the rural areas having even
greater unemployment topping out at 19.6% in some areas (Statistics Canada, 2012). There can
be many interpretations of what these unemployment figures mean but one obvious reason is a
decline in available jobs. It can also mean those who have been displaced in this declining
economy do not possess the education and skills required for the available labour market. In
New Brunswick, adults, both by choice and necessity, are finding themselves in adult education
programs in greater numbers in both formal settings of university and college, and non-formal
training programs.

Rubenson, Yoon, & Desjardin (2007) in their report on Adult Learning in Canada,
describe the Atlantic region as having the highest increase in levels of participation in adult
education between 1994 and 2003, as compared to the rest of Canada. This is seen as a positive
improvement, with 60% growth in participation in the region (Rubenson et al., 2007, p.22).
However, we contend that this number is also troubling because at the same time we are seeing a
higher rate of unemployment and the return to adult education is based on an assumption that
sending workers who are displaced back to training programs or formal education will somehow
change outcomes and contribute to economic development. As Adamuti-Trache (2000) reminds
us, lifelong education is no longer an optional activity, but rather the solution for living in a
global society. The economy in New Brunswick, however, is not reaping the benefits of lifelong
education. While increasing numbers of adults are participating in adult education, New
Brunswick’s economic situation continues to decline. Thus, while many adults are returning to
school and training with the aim to find new jobs, these supposed jobs are becoming even
scarcer. Furthermore, while the numbers reported by Rubenson et al. (2007), in the Atlantic region are encouraging in terms of participation in adult education, the Atlantic region in general is only discussed on 5 pages out of 104 of a national report on participation in adult education. This suggests to us a need for further investigation on the status of adult education in New Brunswick and the rest of Atlantic Canada.

The purpose of this paper is to examine the impact of globalization on the current state of adult education in New Brunswick. One of our key questions is who is conducting adult education in New Brunswick and what does it currently look like? While the history of adult education runs deep in the Maritimes, from university extension and the Coady legacy to government funded training schemes, our belief is that there has been a shift in the purposes of adult education away from an ethic of adult education for personal, social, and political change towards a neo-liberal skills agenda. We also assert that this shift reflects broader trends internationally as evidenced by the OECD and other international political bodies.

The Study

The data for this paper consists of document analysis of existing adult education programs in the province of New Brunswick. Our document analysis consisted of what Bowen (2009) describes as a systematic review that required our data be examined and interpreted in order to “elicit meaning, gain understanding, and develop empirical knowledge” (p.27). Our data was gathered from government sources as well as independent providers and publicly funded programs.

Our theoretical approach uses a critical framework as a lens for exploring the discourses around a neo-liberal agenda. The concept of discourse is helpful for examining the different forms of power and how participation in adult education in New Brunswick has seen to be improving while at the same time the province is seen to be in crisis. Benjamin (2012) reminds us that, power relations are inscribed in discourses as knowledge, and power relationships are achieved by a construction of “truths” about the social and natural world (see Luke, 1995). Discourse is then both a social practice that constitutes the social world and is constituted by other social practices (Phillips & Jørgenson, 2002). What this means is that language used in the development of adult education programs should be considered within its social context and, moreover, it is important to examine how discourses around the neo-liberal skills agenda function ideologically.

We also consider the issues through a political lens. White (2004) has found that adult education and training cannot be separated from the larger political landscape. Youngman (2000) notes that a political economy approach “looks at how the historical evolution and contemporary nature of the capitalist mode of production conditions the relationship between adult education and society” (pp. 3-4). A political economy approach is called for because we are investigating not only the current state of adult education in New Brunswick, but the way in which the political, neo-liberal agenda influences that state.

The Effects of Globalization on New Brunswick Adult Education

The nature of adult education in Canada is diverse and complex (Foley, 2004). In our systematic review we looked at public and private, as well as federal and provincial programs, relevant to adult education in New Brunswick. Research is currently showing that governments have pulled out of much of the provision of training in many industrialized nations. This is also true for
Canada. Over the last two decades the Canadian federal and provincial governments have devolved and decentralized many of their responsibilities to lower levels of government, the private sector, and non-governmental organizations. This has impacted the provision of adult education. Where the federal government once provided training, the current trend is to outsource training to private and/or quasi-governmental agencies. While governments may remain involved in the provision of adult education and training, that involvement is generally through various funding and evaluation schemes with private and quasi-governmental groups doing the actual training. Additionally, continued cuts in federal transfer payments to the provinces has meant a reduction in the amount of funding available for education and training at the provincial level.

Foley (2004) rightfully notes that there have been important changes to adult education over the last 30 years. With the loss of university extension and the shift in the emphasis towards lifelong learning and skills development, adult education is becoming more businesslike in its organization and offerings. Our research shows this to be true in New Brunswick as well.

Findings

We have categorized the findings of our research into two categories: the role of the Government of Canada in providing and funding adult education programs that affect New Brunswick, and the public and private programs and initiatives in the province of New Brunswick. In the second case we examine provincial programs and initiatives, and the role of private business, both big and small, and the provision of adult education in the province.

The Government of Canada

For the most part, in keeping with previous research on the subject, the Government of Canada’s role in the provision of adult education and training is, by and large, financing. The federal government supports adult education and training through the provision of various grants, RRSP benefits, loans, and bonds. There are, however, a select few programs where training is actually offered through a federal department or agency. For example, the Canadian Forces Aboriginal Entry Program, the Aboriginal Training Program in Museum Practices, the Cadets Program, the Junior Canadian Rangers Program, and the Language Instruction for Newcomers to Canada Program all provide training specific to skills development, trades, and vocational programs (Service Canada, 2012). There are a number of government departments involved in the provision of adult education in one form or another. By far the largest department with that responsibility is Human Resources and Skills Development Canada (HRSDC). At the provincial level, HRSDC funded programs are accessed through Service Canada offices.

In keeping with the neo-liberal agenda for a market driven economy, the federal government emphasizes increasing Canada’s educational presence in the global marketplace through Canada’s International Education Strategy. The program is aimed at attracting international students to study in Canada, and at increasing the export and marketization of Canada’s educational services abroad (Foreign Affairs & International Trade Canada, 2011).
Adult education in the province of New Brunswick: Public provision

The Department of Post-Secondary Education, Training and Labour (PETL) works with 12 Regional Adult Learning Committees to deliver community adult learning services. The New Brunswick government does not deliver the training, but instead, provides the funding while outsourcing the training through these regional agents. Community Adult Learning Program (CALP) offers academic and literacy programs through Community Adult Literacy Centre’s. The Adult Learning Centre’s, in conjunction with CALP, provide computer access, programs to assist with General Education Development (GED) testing (Math, English, and French preparatory courses), software and hardware skills, and social media education to adults living in rural and urban areas. The Centre’s are designed to increase the employability level of adults in the province by developing their job preparatory skills and increasing their literacy levels. There is, of late, a greater focus in these programs on digital literacy. That is, these programs are interested more in ensuring that participants are better prepared in the use of electronic and digital media as job preparation rather than the traditional focus on basic literacy and numeracy. PETL describes their Academic Program as providing “training to help learners acquire basic knowledge and skills to strengthen their literacy and numeracy levels” (Government of New Brunswick, September 2012).

Literacy initiatives are the common denominator for the majority of not-for-profit adult training and development programs in New Brunswick. In 2003, adult literacy levels in New Brunswick were at 44% compared to the national level of 52%, and 56% of the population had literacy scores below level 3 (HRSDC, 2012), and that figure climbed to 48% by 2008 (Parent Central, 2008). An International Adult Literacy and Skills Survey (IALSS) administered by Statistics Canada in 2003 further reinforced the sorry state of literacy in New Brunswick (2005). Citing the same survey, the Director of HRSDC’s National Learning Policy Research determined that “less than half of New Brunswick’s working-age population (16-65) have the literacy skills required for coping successfully in today’s world” (Perry, 2006, p.2).

In 2009, the government of New Brunswick published “Working Together for Adult Literacy”, a strategy document on the issue of literacy in the province. The document determined four strategic priorities to improve provincial literacy skills:

1. Reduce barriers and increase participation;
2. Increase the number and range of effective adult literacy learning opportunities;
3. Ensure the quality and effectiveness of adult literacy programs; and
4. Strengthen partnerships to develop a robust and effective adult literacy system (Government of New Brunswick, 2009, p. 7).

In 2010, the Literacy Coalition of New Brunswick (LCNB) released its “Strategic Plan 2010 – 2013.” In response, the Community Adult Learning Services Branch Department of Post-Secondary Education, Training and Labour (PETL) released its Action Plan 2010-2013 in 2010, which indicated that research would be undertaken to determine the best possible methods for addressing these four strategic priorities. These priorities appear redundant in the face of Rubenson et al.’s (2007) assertions that participation in adult education in Atlantic Canada has risen by 60%.

In researching the province of New Brunswick’s education website (Government of New Brunswick, 2012), it would appear that the province offers a number of adult education
programs. However, there are many overlaps among the programs listed on this site. Several of the program descriptions are worded similarly, with subtle differences. For example, Post-Secondary Education, Training and Labour (PETL) lists 11 adult education programs, but three of them, Adult Literacy Services, Community Adult Learning Centres, and Community Adult Learning Program work together under the same literacy mission. What this shows us, however, is reflective of the emphasis on literacy as a skill for employment.

**Adult education in the province of New Brunswick: Private provision**

In New Brunswick private adult education programs are often found in international and national corporations that offer in-house training to their employees in such areas as heavy machinery certifications, environmental practice, leadership and mentoring, and software certification. Many of these companies also provide training and mentoring for professional advancement within the corporation as well as conference and seminar funding, and tuition re-imbursement (relevant to employment) for all employees, from entry-level and to middle management. The larger companies and institutions that serve only provincial or the Atlantic region likewise offer in-house training in areas relevant to all employment levels. However, detailed information regarding those opportunities was often unavailable and difficult to locate.

From our analysis it appears that employers in New Brunswick are offering more in-house employee development training by optimizing their current human resources employees. By using internal staff to deliver training and development initiatives, it can be assumed that this strategy is a cost-saving measure. Several employers provide mentorship programs in an effort to help staff develop, which are likely designed to retain talent and reduce turnover. When words such as ‘development,’ and ‘growth,’ are used to describe the organization’s value statement, the opportunities that present from our analysis are related to role-specific growth, job enhancement, and greater pay. Although each employer’s education and learning descriptions are limited in scope, not surprisingly, it is evident that education for social change is not part of the business sector’s agenda.

Some of the kinds of programs found within the business sector in New Brunswick were programs that focused on the orientation of new employees as well as specialized Executive Training, such as the Executive Development, Middle Manager Development, Career Assignment (for entry-level executives), and Management Trainee Programs. Other programs focused on the employability skills needed to succeed in the workplace. There were other examples of programs with a focus on ‘soft skills’ training such as teamwork, decision-making, and leadership. Additionally, many of the businesses investigated in New Brunswick offered courses specific to a given position such as WHMIS, banking, investment, capital markets, technology, and operation.

**Analysis of Findings**

One of the key findings of this research is the tension between policy and practice; what government documentation says is happening and what is actually happening on the ground. The rhetoric surrounding the policy documents analyzed for this research does indicate an emphasis on adult education and training in New Brunswick (Robichaud, personal communication, July 12, 1012). However, closer examination reveals that the emphasis is on adult literacy and adult literacy programs rather than a more comprehensive approach to adult
education. At the same time, there have been substantial cuts to adult education generally at the province and at the federal level. For example, the Canadian Council on learning has had its funding cut and was dissolved as a non-profit corporation. Provincially, the New Brunswick Federation of Labour reports that recent cuts to the provincial budget has resulted in a $1 million cut to adult learning services (http://nbfl.m5i.com/wp-content/uploads/2012/09/Federal-and-Provincial-Budgets-Sacrificing-People-to-the-Economy-.pdf). It is the contradictory nature of these findings that is interesting here. On the one hand, we have documentation from both levels of government that state adult education is significant. This is, as we have noted, especially true in the context of the knowledge and global economies. On the other hand, however, we have substantial cuts to significant adult education organizations, which must mean a reduction in overall services. As adult educators, it is this contradiction between the rhetoric and the practice that we must continue to highlight and interrogate.

We have also noted our finding that the vast majority of adult education programs in New Brunswick are focused on adult literacy and adult literacy skills development. There has been a trend in New Brunswick towards conflating adult education with adult literacy programs. As noted above, much of the documentation found pertaining to adult education in New Brunswick (especially in government and non-profit sectors) focuses on literacy initiatives and literacy programs. In the light of the overwhelming emphasis at both levels of government on the global market place, and the role that education and training can play for individuals (and nations) to enter into and remain in that global market place, this is not surprising.

Lastly, this research has found that in keeping with national and international trends, the emphasis and focus on adult education programs remains on skill and knowledge development for the labour market. Our analysis of the Government of Canada’s involvement with adult education programs shows that many of these programs are aligned with knowledge economy principles (HRSDC, 2002) and are influenced by the mandate to enhance employability skills to make Canada a leader in the global marketplace. We see the same emphasis in New Brunswick where programs are geared to literacy (and recently digital) literacy programs as a means through which to enter the labour market and make New Brunswick competitive.

Conclusions and Implications for Adult Education and Practice

Education is shifting from what was once prominent in developing active participation and citizenship, to producing a self-sufficient workforce that is prepared for the demands of the ever-changing and globalized labour-market. Lehmann and Taylor (2003) argue that employability skills demonstrate a new kind of vocationalism, marked by the influence of the Conference Board of Canada’s Employability Skills Profile (ESP) (McLaughlin, 1992). What the ESP provides is an interpretation of specific competencies and learning outcomes. Employability skills are generally thought of as the combination of generic ‘soft’ and ‘hard’ skills or competencies that are needed by workers (Williams, 2005). ‘Soft’ skills refer to behaviours and aptitudes, such as teamwork, which are believed necessary for employment, whereas the ‘hard’ skills are specific quantifiable skills such as writing a resume or cover letter (Benjamin, 2009).

A key aspect to this understanding of employability is the presumption of sameness in the expectation that workers all need the same generic sets of skills and behaviours. We must also consider the kind of economic development and job creation under discussion. In tandem with a neo-liberal market ideology and globalization comes the knowledge economy. Most Western, industrialized countries now view knowledge as the basis of their economies. In
the government documentation reviewed for this research, the focus was entirely on the knowledge economy. However, this is somewhat of a disconnect here between the rhetoric and the reality as many of us live in regions often largely untouched by the knowledge economy. New Brunswick is in just such a region.

As evidenced in the data, the knowledge economy and education’s role in it remains at the forefront of economic development thinking in this country and this region. A significant criticism of the knowledge economy has been the potential for a large gap to develop between those who know and those who work. There are concerns that a knowledge-based economy leaves lesser skilled individuals on the margins of the workforce. Attention should be given to the emphasis placed on the knowledge economy itself and the predilection for high skills training for communities often untouched by the knowledge economy. Does not such an emphasis, especially in the policy sphere, in and of itself, marginalize many regardless of whether they have or can obtain high skills? Not all workers have access to the knowledge economy. Care must be taken in policy formulation to recognize that not all workers can participate in the new economy. Furthermore, policy focused on developing and enhancing the knowledge economy must assume conditions that do not exist in many regions.

Continued unquestioned emphasis on training (and education) for the knowledge economy, and the subsequent influence that this will undoubtedly have on policy development, has great potential to marginalize individuals, communities and regions that do not possess the physical, economic, educational, social, and community infrastructures to support the knowledge economy.
References


Eating As If It Really Matters: 
Teaching The Pedagogy of Food 
in the Age of Globalization

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Abstract

To survive, we need to eat. And yet eating is much more than just ingesting fuel to keep our bodies going. Besides being a source of sustenance, food is a cause for celebration, an inducement to temptation, a weapon for wielding power, an indicator of well-being, a catalyst for change, and a vehicle for learning. In the age of globalization, these characteristics are magnified and obscured – magnified by the complexities of globalization and obscured by the powerful interests that drive this process forward. Within this global context, this paper describes the development and teaching of an adult education course called The Pedagogy of Food. Born out of the recent upsurge in interest in food-related issues, the course focused on eating as a pedagogical act, and invited students to become part of the global dialogue on food.

Key words: global food system, pedagogy of food, resistance movements, globalization and change.

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Food is a necessity of life – people have to eat every day. And while some of us may take it for granted, many others can barely get enough to survive. According to the Food and Agriculture Organization (FAO, 2010), over 1 billion people around the world are estimated to be undernourished – more than at any time since 1970, the earliest year for which comparable statistics are available. At the same time, an equal number of people are obese, as a result of a global food system that pushes cheap, empty calories onto vulnerable populations, not only in the global North, but now also in the global South:

As affluent western markets reach saturation point, global food and drink firms have been opening up new frontiers among people living on $2 a day in low- and middle-income countries. The world’s poor have become their vehicle for growth. (Lawrence, 2011, p. 8)

And yet, food is more than just fuel for the body. In the words of Michael Pollan (2008):

Food is also about pleasure, about community, about family and spirituality, about our relationship to the natural world, and about expressing our identity. As long as humans have been taking meals together, eating has been as much about culture as it has been about biology. (p. 8)

In the age of globalization, and particularly with the predominance of a global food system, food merits scrutiny by academics and practitioners of all sorts, including adult educators (Sumner, 2013). This article will address the interconnected issues of food, globalization, and adult education through an exploration of the development and teaching of a special-topics course in the Adult Education and Community Development (AECD) Program of the Ontario Institute for Studies in Education (OISE) at the University of Toronto. It will begin with an examination of globalization, including the globalization of food, to set the larger global context for a discussion of the design and teaching of a new course called The Pedagogy of Food. It will conclude with some reflections on how globalization plays out within the practice of teaching adult education.

Globalization

Globalization is a fairly recent word in the English language, first appearing in 1959 (Simpson & Weiner, 1989) and gaining momentum toward the end of the twentieth century. While sometimes used to retroactively describe historic waves of colonialism and imperialism, it is mostly associated with current phenomena, such as the spread of neoliberalism, the diffusion of American culture, the overcoming of borders, and the development of worldwide communications. For example, Sharan Merriam (2011) argues that globalization is characterized by a technologically linked worldwide market economy, and by the movement of people, services, goods, and ideas across national borders.

Seen by some as “the process whereby the population of the world is increasingly bonded into a single society” (Albrow, 1993, p. 248), globalization has also been described as a “world system in which powerful, interconnected, stateless corporations nullify national boundaries and
incorporate whole societies as cost-effective sites of production” (Ratner, 1997, p. 271). In the words of Laxer (1995), globalization is a term that “carries much freight” (p. 288) – it implies a kind of worldwide connectedness while hiding an economic agenda that favours transnational corporations. For example, geographer David Harvey (2001) sees globalization not “as an undifferentiated unity but as a geographically articulated patterning of global capitalist activities and relations” (p. 403). For Harvey (2001), “capitalism is a constantly revolutionary force in world history, a force that perpetually re-shapes the world into new and often quite unexpected configurations” (p. 403). He refers to the newest configuration of capitalism as flexible accumulation, which rests on flexibility with respect to labour processes, labour markets, products, and patterns of consumption. Turnover time in production, always one of the keys to capitalist profitability, is reduced dramatically under a regime of flexible accumulation, but this accelerated turnover time would be useless unless the turnover time in consumption was also reduced – hence the advent of such consumer trends as ‘disposable fashion’ and endless electronic upgrades.

It is clear, then, that globalization is a deeply complex phenomenon. Like a mantra or catechism, it is endlessly repeated, but often without a clear understanding of what it means. In order to cut through the vagueness and gain greater understanding, it is important to ask what is being globalized – are women’s rights, environmental protections, public education, universal healthcare, and life security being globalized, or are corporate rights, environmental deregulation, privatized education, cash-and-carry healthcare, and police surveillance being globalized (Sumner, 2008a)?

Regardless of political orientation, it is clear that in the age of globalization, the latter are being favoured over the former. This explains the plethora of negative social, environmental, and economic impacts of globalization found throughout the literature (see, for example, Mander & Goldsmith, 1996; Brecher, Costello & Smith, 2000; Ellwood, 2001; Sumner, 2005).

And yet, globalization has also offered unprecedented opportunities, including the worldwide connectivity that facilitates global communications, increased travel and migration, and the introduction of new music and cultures. None of these opportunities, however, has been more exciting, or more controversial, than food.

The Globalization of Food

Food has long been globalized as “a process of homogenization whereby the cuisines of the world have been increasingly untied from regional food production, and one that promises to make the foods of the world available to everyone in the world” (Kiple, 2001, p.1). Phyllis Thompson (2007) describes how early dispersals were largely due to nomadic migration, with the first systematized long-distance food trading undertaken by Sumer and Egypt three thousand years ago. Over time, she argues:

Significant agents of dispersal included forces as various as Spice Route merchants, the Mongol and Norman conquests, galleons carrying silver from Spain to the Philippines, colonists and the colonized, and the slave trade. (p. 3)

But it was not until late in the twentieth century that food was formally organized into a
global trading system. At its most basic, the global food system can be understood as an interdependent web of corporate-controlled activities at the global scale that include the production, processing, distribution, wholesaling, retailing, consumption, and disposal of food (Sumner, 2011a). Globalizing food in this manner has produced mixed results, reflecting the complexity of both globalization and food. On the one hand, it has created an interconnected series of catastrophic problems, succinctly described by Rosset (as cited in Albritton, 2009):

Why must we put up with a global food system that ruins rural economies worldwide, drives family and peasant farmers off the land in droves, and into slums, ghettos and international migrant streams? … That imposes a kind of agriculture that destroys the soil, contaminates ground water, eliminates trees from rural areas, creates pests that are resistant to pesticides, and puts the future productivity of agriculture in doubt? … Food that is laden with sugar, salt, fat, starch, carcinogenic colours and preservatives, pesticide residues and genetically modified organisms, and that may well be driving global epidemics of obesity for some (and hunger for others), heart disease, diabetes and cancer? A food system that bloats the coffers of unaccountable corporations, corrupts governments and kills famers and consumers while wrecking the environment? (p. 200)

On the other hand, globalizing food has resulted in the introduction of new foods to unaccustomed palates, facilitated the spread of ethnic cuisines, and opened up avenues for worldwide social-justice initiatives, such as fair trade. For these, and many other, reasons, the problems, and the opportunities, presented by the globalization of food have sparked the interest of academics, as well as the general public, as evidenced by the proliferation of food-related social movements: the local food movement, the organic farming movement, the fair trade movement, the Slow Food movement, and the food justice movement. Within this larger context of the problems and opportunities of globalization, including the globalization of food and the ensuing interest in issues related to food, I developed a special-topics course called The Pedagogy of Food.

Designing The Pedagogy of Food

I arrived at the study of food through multiple paths: sustainability, globalization, and agriculture. Based on a graduate background in rural extension, my PhD had focused on the sustainability of rural communities in the age of globalization, and a SSHRC post-doctoral fellowship had leveraged an earlier diploma in agriculture to study the contribution of organic farmers to rural community sustainability. From an involvement in organic agriculture, it was a short step to the study of food, within both adult education and the new interdisciplinary field of food studies, culminating in the co-editorship of the first book in Canada on food studies (Koc et al., 2012).

The methodology or overarching theoretical approach to designing this course is consistent with the critical paradigm, which – as in research design – has the goal of transformation and empowerment, and is concerned with action informed by reflection (Kerka, 2005). And just as critical research begins from the premise that all cultural life is in constant tension between
control and resistance (Thomas, as cited in Creswell, 1994), critical course design posits the same tension, particularly a course about food developed within a larger context of the dialectic between the growing control of the global corporate food system and the burgeoning resistance evidenced by the rise of a wide range of social movements – the Slow Food movement, the local food movement, the organic farming movement, the food justice movement, and the fair trade movement. Working from this perspective, I studied courses devoted to food in other disciplines, reflected on courses I had developed within the field of adult education, and considered the issues I thought students should understand by the time they finished the semester. From inception to execution, the course took shape over approximately a one-year period.

As I began to develop this course, I quickly realized that it had to reflect the excitement that was already building around the possibilities and pitfalls associated with food. In terms of readings, this meant riding the wave of cutting-edge academic research as well as books that used this research to bridge to more general audiences. In other words, I needed to find a balance of scholarly fare and more popular publications. And since I teach from a critical perspective – mainly political economy – I searched for sources that would not accept food at face value, but problematize it. This task was made easier by working in Toronto, which has a vibrant food community (known as ‘foodies’) and a myriad of people writing about food. In the end, I chose a mix of scholarly and popular articles, including, for example, not only the work of journalist-turned-academic Michael Pollan (2008), but also a scholarly article by Julie Guthman (2007) entitled “Commentary on Teaching Food: Why I am Fed Up with Michael Pollan et al.” I also chose two books by local authors, both of whom agreed to come to the class and speak to the students: The No-Nonsense Guide to World Food by Wayne Roberts and Locavore: From Farmers’ Fields to Rooftop Gardens – How Canadians are Changing the Way We Eat by Sarah Elton. In this way, I hoped to appeal to the reflexive practitioners who make up the majority of AECD’s Masters students, while reaching from the local to the global.

When developing the course description (Sumner 2011b), I anchored it to a statement by Wendell Berry (1990), which has global implications.

Following the lead of American essayist Wendell Berry, who has argued that eating is an agricultural act, this special-topics course will focus on the idea that eating is also a pedagogical act. What do we learn, and unlearn, from the food we eat? How is the food on our plate connected to such issues as food systems, food politics, food justice, food security, food sovereignty and food movements? Can we consume our way into a more sustainable future, or does this simply reinforce our current unsustainable way of life? This course will explore these and other questions, keeping in mind that food can be a catalyst for learning, resistance and change (p. 1).

The questions were meant to pique students’ interest and encourage them to see themselves in the course material, while the past, present, and future of Canadian adult education was alluded to in the phrase, “learning, resistance and change” (Sumner 2011, p. 1). I particularly wanted the course to align with the three main and enduring traditions of Canadian adult education, as identified by Nesbit (2006, p. 17):
1. A set of unyielding social purposes, informed by passion and outrage, and rooted in a concern for the less privileged.

2. A systematic and sustained philosophical and critical analysis that develops the abilities to connect immediate, individual experiences with underlying societal structures.

3. A keen attention to the specific sites, locations, and practices where such purposes and analyses are made real in the lives of Canadians.

These three traditions can be used as benchmarks to assess the past, understand the present, and guide the future of adult education. According to Nesbit (2006), they highlight the fact that

The practice of adult education in Canada is not the manifestation of a set of abstract concepts, but one part of a broader and vital mission for “really useful knowledge” that helps create a more equitable world at individual, family, community, and societal levels. (p. 17)

The three main and enduring traditions of Canadian adult education dovetail with the critical perspective brought to the course and with the relatively new concept of critical food pedagogies, which entails a range of approaches that are concerned with the kind of social change that addresses power and injustice (Sumner, 2013b in press). They also interface constructively with adult learning theory, and can be understood as criteria for putting theory into practice, while highlighting that “adult learning is more than cognitive processing, that it is a multidimensional phenomenon, and that it takes place in various contexts” (Merriam, 2008a, p. 97). The three traditions were discussed in class, and students were also provided with a handout that they could refer to when writing their final paper.

After writing the course description, I searched the literature for course themes. Like all course themes, I wanted these themes to focus student thinking and help them reach out beyond themselves to issues that affect other people around the world. After much consideration, I chose three course themes:

- Eating is an agricultural act (Berry, 1990)
- Eating is a pedagogical act (Sumner, 2008b)
- Food is an edible dynamic (Belasco, 2007)

When I first came across Wendell Berry’s aphorisms several years ago, it exploded in my mind, gathering all the disparate knowledge I had acquired regarding agriculture and food, and fusing them into a cycle with no end. It made the links from field to fork, and brought a holism to my thinking that had not existed before. I hoped it would do the same for students, especially since such holistic understanding is important when studying issues like food and globalization. In a global food system, people often experience what Kneen (as cited in Koc et al., 2012) referred to as distancing – the separation between consumers and the sources of their food – to such an extent that many of them assume that food comes from a store, not a farm. Berry’s words expose this distancing and encourage us to participate more fully in knowing where our
From Berry’s aphorism, I determined that eating has many other facets. It is a social act because a great deal of food preparation and consumption is done in social groups, particularly families. Eating is also a political act, not only when people participate in boycotts and refuse to eat something (such as the boycott against Nestlé for promoting its infant formula over breastfeeding in developing countries where the water mixed with the formula is not safe to drink) but also when they participate in boycotts and preferentially eat something (such as deliberately choosing local food or organic food). Eating is also a cultural act, which can pass on cultural knowledge such as preparing food and marking celebrations. It is an economic act, which can support a vibrant local economy or decimate it. And eating is an environmental act, which can contribute to sustainability by reducing pesticides through choosing organic food or eliminating the carbon emissions associated with imported food by eating local food.

Most importantly for adult educators, however, eating is a pedagogical act:

- It involves teaching, learning, inclusion, enculturation, etiquette, environmental awareness, sharing, alliances, celebration, and transcendence. Food catalyzes the potential for experiential learning, social learning, lifelong learning, transformative learning, informal learning, incidental learning, embodied learning and collective learning. It can develop ecological literacy, promote indigenous knowledge and invite questions about what sustainability can mean in practice, how to implement it and the role of adult education in the implementation process. (Sumner, 2008b, p. 35)

In many ways, conceptualizing eating as a pedagogical act can help to promote the kind of global consciousness so necessary in the age of globalization. It can make us aware of the structures and processes that shape our food system, which can open the door to questions about other vital global issues, such as water and energy.

Belasco’s (2007) famous quote that food is an edible dynamic seemed appropriate for the third theme, reflecting his understanding that food can become “a way of integrating the world, seeing the social consequences of private actions, and reminding us of our moral responsibilities... It is a visceral, lived daily link between the personal and the political” (Belasco, 2005, p. 217). His quote highlights the fact that food is a powerful, fluid, and ever-changing force that can promote integrative thinking and link the individual with society. Overall, the three themes encompass the idea that food can be a catalyst for an integrative, global vision that can critique our current food system and model a more sustainable one.

In terms of evaluation, I developed four assignments that I hoped would stimulate students’ thinking regarding food and learning. The first assignment was a personal reflection worth 10% and due the second week of class. It was designed to encourage students to begin reflecting about food, to make connections and to think both locally and globally. For the assignment, they were required to include a number of parameters: the role of food in their life, their understanding of what we can learn from food, and their vision of the role that food can play in the search for a more sustainable world.

The second assignment was a group presentation worth 30% and scheduled during the last
part of the semester. Group assignments are not only an opportunity for group members to learn about a particular subject, but also a chance for the class to learn as the group presents their material. Students are encouraged to consider group presentations as teaching and learning opportunities, and to employ adult education techniques during their presentation, such as class discussions, break-out groups and learning activities, while mixing their presentation modes. For this assignment, students were asked to present an analysis of a program or organization that focused on food, using a critical lens of their choice. The program or organization could be local, regional, national, or global, as long as it dealt with food. The parameters for evaluation included a description of the program/organization (e.g., its history, mandate, etc.), a discussion of the adult education aspect of the program or organization, a discussion linking the program or organization to at least one of the food issues discussed in the course (e.g., globalization), and a critique of the overall effectiveness of the program or organization, including a discussion of whether or not it met the criteria of the course themes.

The third and fourth assignments were tied together. The third assignment involved preparing a poster, and giving a ten-minute presentation on the subject of their final paper. Each poster needed to include a mix of print and pictures, arranged in such a way that it became a teaching tool. The parameters for the assignment was that the poster should convey a central theme, message, or idea; make connections to course readings; portray an overall vision of the pedagogy of food; and show creativity and originality. Worth 20% of the final grade, these poster presentations were scheduled for the last two days of classes, with the aim of helping the students to reflect on what they had learned during the semester.

The fourth assignment was the final paper – worth 40% of their final grade and due on the last day of class. Using the course readings as a basic resource, students were asked to write a final paper that would concentrate on one theme of the pedagogy of food, such as globalization. The parameters for evaluation asked them to demonstrate mastery of the course readings, define and discuss the theme of choice, link the readings to the theme of choice, explain the role of adult education in the theme of choice, and include their vision of the role that food could play in the search for a more sustainable world.

Teaching The Pedagogy of Food

Developing a new course is always a gamble – it is sometimes difficult to really know if students will actually sign up for it. But students were genuinely interested, and on the first day of the semester I faced a class of 21 students – one more than the quota for a Masters-level course at OISE. What was clear from the outset was that food was an exciting topic for them. From the moment they walked in the door until the end of class three hours later, they could not stop talking about food and food issues.

Class discussion was enlivened by the fact that OISE students themselves are a product of globalization. To begin with, they come from a wide variety of backgrounds, reflecting the multicultural mix that makes Toronto such an exciting city. Many students are immigrants, or children of immigrants, and they brought their global food stories to the classroom. They also brought all kinds of food – spontaneously and joyfully – and shared it with everyone, along with stories about the food. For example, one woman was a Russian emigrée and brought Russian bread to class one day, to show us what she grew up eating. In addition, many OISE students have travelled to various parts of the world for work or pleasure – cheap travel being one of the
by-products of the hitherto cheap oil that has fueled globalization. They brought their travel experiences, and their food adventures, to the classroom.

In the participatory atmosphere of the Masters-level classroom at OISE, where we build on each other’s knowledge and life experiences, I seldom lecture. But for this class I did give some guidelines around key issues. In particular, I explained neoliberalism, as it provides the theoretical underpinnings for globalization, as it currently exists. In addition, I discussed political economy as a useful framework for analyzing the global food system and modeling more sustainable alternatives. Political economy can help graduate students to develop a critical attitude and learn to take into account the environmental, social, cultural, economic, and political forces that have shaped all the steps in bringing food from around the world to their plates. To illustrate the importance of such analysis and modeling, I also carried out an exercise in commodity fetishism. I held up an orange in front of the class – an iconic product of the global food system – and asked, “If this orange could speak, what would it tell you?” After a pause, the students began to offer answers – how it was grown, whether it was sprayed with pesticides, who picked it, what they were paid, how many people had handled it, how long it had been travelling. Such an exercise helps to broaden and deepen their thinking about food, and other global commodities, and start to ask questions and lay the groundwork for social change.

I invited a number of speakers to class, who had firsthand knowledge of both local and global food issues. The first speaker was Mike Schreiner, the leader of the Green Party of Ontario, who had been on the ground floor of some of the progressive changes in the food system both in Toronto and in the province of Ontario. A PhD student, Charles Levkoe, who had written a seminal article on learning democracy through food justice movements, led the students in a wide-ranging discussion regarding structural issues associated with food and globalization. Sarah Elton, who wrote a book about her travels across Canada in search of local food, made links for the students between the personal and the global. And Wayne Roberts talked about the global food system, punctuated by stories of his research trips to examine food issues in other countries.

One day, a student led the class in a mindful eating exercise. She had participated in such an exercise at a recent Buddhist retreat, and wanted to share the experience with the rest of us. First, she handed out small squares of Wonder Bread, and asked everyone to relax and just observe the square. Then she told us to pick it up, feel it, weigh it in our hand, smell it and listen to it. Finally, she instructed us to put it in our mouths and chew it slowly, considering the flavour and texture. She then handed out small squares of whole wheat bread that I had made at home, and took us through the same exercise. We then discussed the differences between an industrial product like Wonder Bread – what Pollan (2008) would label “an edible food-like substance” (p. 1) – and the homemade bread with its six wholesome ingredients.

On the last day of class, everyone brought a snack with a story, whether it was a comfort food, a dish their grandmother used to make, a cultural specialty, or something they had learned to cook when travelling. We shared the food and the stories as we engaged with the last round of posters.
Reflections on Teaching *The Pedagogy of Food*

Food provides a platform to think, to teach, and to learn. It is a vehicle for inquiry and an entrée into larger issues, such as globalization. In this way, food is the perfect focus for a course at any level. Developing and teaching a Masters course in this subject area has allowed me to share what I know about food while learning new ideas, practices, and critiques from students who bring a rich set of experiences to the classroom. Their learning, in turn, was reflected in the assignments they carried out.

The first assignment produced thoughtful personal reflections about food in their life and in the world, including heartfelt stories about food memories and food fears. Some wrote of struggles with food and weight, and the social pressure for thinness that made their relationship to food ambivalent at best. Others wrote about how their grandparents grew vegetables in the back yard, remembering the simple pleasure of eating food fresh from the garden. Everyone bemoaned the global food system, and the hunger and obesity problems it creates.

The group projects represented a range of scales. Two groups presented on local food justice centres (The Stop and FoodShare) and one group chose a regional food-coordinating organization (Sustain Ontario). A fourth group looked to the United States and taught us about the sustainable urban agriculture project, Farm to Family, and a fifth group took on Coca-Cola – a potent symbol of globalization. Discussions during and after each presentation went well beyond the allotted time, and linked the projects with larger issues connected to the globalization of food.

The posters were more successful than I thought possible. We set up the classroom like an art gallery, so we could walk from poster to poster and listen while each person gave their ten-minute presentation. On their appointed day, students unfurled their creations and hung them on the walls. Although just a snapshot of their final paper, the posters became an opportunity to share their research with fellow students. Many posters dealt with issues associated with globalization: food in a cultural context, power in the global food system, the collapse of the global fishery, the global implications of local microfinancing initiatives, and urban agriculture in the global South and the global North. Others chose themes with global implications: gender and food, women and sustainable food production, food and indigenous sovereignty movements, cancer and the food system, food literacy, and food and climate change. The posters became a multifaceted learning experience for everyone, especially in ways that I had not expected. When I asked each person what they had learned about themselves when making the poster, the responses were wide ranging. Some found that they could not make the poster without first completing their final paper, while others discovered that the poster became an essential organizing tool that helped them to write their paper. Some learned how much they enjoyed working in a different medium, while one or two realized they hated making posters. Some appreciated the chance to shine as visual learners, and others struggled to find their creative side.

The final papers, in turn, were as exciting as the posters, and a pleasure to read. The students had worked with relish and outdone themselves in their fields of inquiry. From Nunavut to India and from urban centres to the depths of the ocean, they had researched and assembled a wealth of knowledge. The course evaluations reflected their engagement – full of enthusiastic comments, thoughtful suggestions, and positive feedback for what I hope will become a permanent course.

Teaching *The Pedagogy of Food* has helped me to honour the three main and enduring
traditions of adult education (Nesbit, 2006) – traditions I respect and believe in. It incorporated a set of unyielding social purposes, informed by passion and outrage with respect to the global food system, and many readings and discussions were rooted in a concern for the less privileged. The theorizing about neoliberalism and political economy helped students to develop the abilities to connect immediate, individual experiences with underlying societal structures. And the ongoing dialectic between the local and the global, and the personal and the social, made these purposes and analyses real in the lives of the students. Connecting The Pedagogy of Food with the three traditions confirms Merriam’s (2008b) observation that “adult learning is at the heart of all adult education practice” (p. 1). Such learning can be achieved through several strategies: “encouraging reflection and dialogue,” “connecting new learning with learners’ previous experience,” and “expanding our repertoire of instruction to include creative and artistic modes of inquiry” (Merriam, 2008a, p. 98). All of these strategies are enhanced by food – it is, in essence, a lubricant for the learning process.

Teaching The Pedagogy of Food also highlighted some of the primary themes that run through adult education. First, it connected to social movements and social movement learning by making links to food-related social movements and what people inside and outside the movements can learn (see Hall, 2006). Second, it bolstered the subfield of environmental adult education through discussions of organics, pesticide use, and land stewardship. Third, it introduced the concept of food literacy, which fits strategically within the larger study of literacy in the field of adult education. Fourth, it made links to community development by exploring community food programs. Fifth, it provided new insights about the dynamism of adult education by linking it to the emerging interdisciplinary field of food studies. And sixth, it opened opportunities for many kinds of adult learning, such as transformative learning, spiritual learning, somatic learning and narrative learning.

And finally, teaching The Pedagogy of Food illustrates the importance of Merriam’s (2011) focus on lifelong learning in the age of globalization. For Merriam, such learning is now life-long and life-wide and occurs, not only in educational institutions, but in the workplace, cyberspace, the community, and one’s family. Food can be a powerful catalyst for lifelong learning, not only as a portal to other vital issues, but also in its own right. In many ways, the global food system has lead us down an unsustainable path and we have to learn our way out of our current environmentally, socially, and economically destructive practices and learn our way in to more sustainable ways of life.

**Conclusion**

Over the years, the global food system has distanced us from our food, and it is time to get reacquainted with it. Designing and teaching a course about food has strengthened my relationship with the food I eat – it is, after all, The Intimate Commodity (Winson, 1993). The course has also profoundly affected my practice of teaching adult education within global contexts: it has rekindled my commitment to adult education, helped me forge productive alliances with other disciplines and social movements, and projected the three main and enduring traditions of adult education (Nesbit, 2006) into the future. It has also been recognized as a pioneering effort in the field of food pedagogies (Flowers & Swan, 2012).

Teaching this course has made me realize that to continue to be relevant within a global context, adult education must engage with issues that capture the hearts and minds – and, in this
case, stomachs – of learners. This does not mean jumping on every passing fad, but it does entail a deep engagement with the phenomena of globalization.

Globalization – whether we agree with it or not – is here to stay. While we may not like its present form, we can work to improve it. Adult education can be one of the means to facilitate this change, with food as the spark that kindles the lifelong learning to make us thoughtful and reflective practitioners, and eaters.
References


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*Eating As If It Really Mattered*


Global Connectedness and Global Migration: Insights from the International Changing Academic Profession Survey

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Abstract

The Changing Academic Profession (CAP) international survey was designed in part to consider the effects of globalization on the work context and activities of academics in 19 countries or regions around the world. This paper draws from a subset of these data to explore the extent to which academics are globally connected in their research and teaching, and the ways this connectedness relates to global migration. Across multiple measures, immigrant academics (i.e., academics working in countries where they were not born and did not receive their first degree) were more globally connected than national academics (i.e., those working in the countries of their birth and first degree). Global migration by academic staff is clearly a major contributor to the internationalization of higher education institutions, yet there was no evidence these contributions led to enhanced career progress or job satisfaction for immigrant academics relative to national academics. The international expertise and experience of immigrant academics may not be sufficiently recognized and valued by their institutions.

Key words: immigrant academics, internationalization, workload, Changing Academic Profession survey

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Globalization and internationalization are dominant themes in higher education worldwide. Higher education policies, institutional mission statements and strategic plans, and the research literature abound with references to globalization and corresponding internationalization strategies (Egron-Polak & Hudson, 2010; Kehm & Teichler, 2007). Attempts to understand the prevalence, motivations, and consequences of global connectedness have focused predominantly upon students, with comparably less attention devoted to academic staff (Altbach, Reisberg, & Rumbley, 2009; Kim, 2009; Saltmarsh & Swirski, 2010). The purpose of this paper is to explore the intersections between global connectedness and global migration for academics as reflected in the Changing Academic Profession (CAP) international survey. In particular, we draw attention to differences in global connectedness for academics who are working in the countries of their birth and first degree (i.e., national academics) compared to those who are working in countries where they were not born and did not receive their first degree (i.e., immigrant academics). We are interested in the extent to which immigrant academics contribute to the internationalization agendas of their institutions and the ways these contributions relate to their work practices and career performance.

Globalization and Internationalization in Higher Education

Globalization is the context of economic and academic trends that are part of the reality of the 21st century. Internationalization includes the policies and practices undertaken by academic systems and institutions—and even individuals—to cope with the global academic environment. (Altbach & Knight, 2007, p. 290)

Universities have had a decidedly international focus and constituency since their inception in early medieval times, and this emphasis has expanded considerably in the present era of globalization and rapid technological advances (Altbach et al., 2009; Egron-Polak & Hudson, 2010; Kim, 2009). The Bologna process, the Latin American and the Caribbean area for higher education initiative, the African Network for Internationalization of Education, and other such schemes are evidence of an enhanced focus on globalization and internationalization for universities worldwide. These schemes draw attention to the fact that “students and programs [are] moving across borders with increasing ease” (Altbach et al., 2009, p. 56) and recognize that “universities, the knowledge they produce, the academics they employ, and the students they graduate are directly and intimately connected to the global knowledge economy” (p. 27).

Branch campuses, off-shore programs, collaborative degree programs, and research exchanges are just a few of the many international opportunities for students and academics. Altbach et al. (2009) clarify that internationalization can be achieved at home or abroad:

Internationalization at home typically consists of strategies and approaches designed to inject an international dimension into the home campus experience—for example, by including global and comparative perspectives in the curriculum or recruiting international students, scholars, and faculty and leveraging their presence on campus. Internationalization abroad, on the other hand, calls for an institution to project itself and its stakeholders out in the world. Key examples include sending students to study abroad, setting up a branch campus overseas, or engaging in an interinstitutional partnership. (p. 24)
Immigrant academics can provide internationalization at home, while immigrant and national academics can both contribute to internationalization abroad.

Egron-Polak and Hudson (2010) document the rationale, motivations, obstacles, and risks for a whole range of internationalization strategies at home and abroad. They found 87% of the 745 responding institutions from 115 countries identified internationalization in their strategic plans or mission statements, 65% of the institutional leaders ascribed high importance to internationalization, and 78% reported that internationalization had increased in importance from three years prior. As Egron-Polak and Hudson noted, internationalization is linked to prestige and reputation, and is therefore a key feature of competitiveness for institutions and for nations.

The Association of Universities and Colleges of Canada (2007) conducted a survey of internationalization within Canadian higher education institutions. All institutions identified internationalization as a priority and core mandate, which was most often reflected in a commitment to prepare “internationally knowledgeable graduates,” that is, to enhance students’ international and intercultural skills as part of their preparation to contribute productively and compete successfully in a globalized economy. The survey revealed a “deepening and broadening of activities to integrate an international dimension into [institutions’] core teaching, research and service functions” (p. 3). In Canada, as in many nations around the world, internationalization is recognized as integral to “institutional strategies, organizational approaches, and expected learning outcomes for students” (p. 3). More and more, the various policies and practices associated with internationalization have become critical to the mission of universities and higher education systems.

**Academic Staff and Internationalization**

Internationalization policies and practices in higher education institutions have implications for the academic staff who work in these institutions. “As the driving force behind teaching and research in higher education institutions, [academic] faculty play a pivotal role in campus internationalization” (Center for Internationalization and Global Engagement, 2012, p. 14). For this reason, the Center for Internationalization and Global Engagement (2012) identifies policies and practices for academic staff as one of the six target areas for “comprehensive internationalization.” Unless academic staff are engaged in and committed to internationalization, institutions will be unable to achieve their internationalization goals. The International Association of Universities’ third global survey revealed that academic staff can be major drivers for internationalization within their institutions, and at the same time, limited interest, involvement, or experience of academic staff can be major obstacles (Egron-Polak & Hudson, 2010). As Egron-Polak and Hudson (2010) have argued, there is a need for “greater attention [to be] paid to ensuring the [academic] faculty members have the needed knowledge, understanding and appreciation of the wider world” (p. 63) in order to achieve the internationalization goals their institutions set.

Egron-Polak and Hudson (2010) identified the lack of recognition of internationalization work in promotion decisions as a particular risk in North America. Despite the importance of such recognition, the Center for Internationalization and Global Engagement’s (2012) survey of 1,041 U.S. higher education institutions found few institutions had guidelines for considering international work or experience in tenure and promotion decisions (8%); however, this amount
varied by institution type, with higher rates in doctorate-granting universities (25%) than master’s colleges and universities (12%), baccalaureate colleges (11%), or associate’s colleges (1%). Engaging in international research collaboration, taking students abroad, and other international activities require considerable time and effort, and may be considered “simply too risky in terms of career progress” (p. 15) in institutions where tenure and promotion criteria do not value these aspects of the institution’s mission. This limited attention to internationalization work for tenure and promotion decisions also comes at a time when there has been a slight drop in the percentage of institutions that present awards to recognize academic staff for their international activities (from 21% to 16%). There were, however, sharp increases in the percentage of institutions that consider international background, experience, and interests when hiring academic staff, even in fields that are not explicitly international (from 32% to 68%).

Global Migration Within the Academic Profession

Hiring individuals from other countries for academic positions is an obvious means to enhance the international quotient (Knight, 2001) of an institution. There is a sense that “international experience’ is inherently valuable, because it increases exposure to new skills, ideas and ways of working, it facilitates the transfer of knowledge and creativity” (Seeber & Lepori, 2011, p. 1). Academics who have emigrated from elsewhere bring international experience that could positively affect the research, teaching, and service that they provide on campus (internationalization at home) and, at the same time, may predispose them to activities that can enhance internationalization abroad. However, without ongoing recognition for their international experience and the international activities in which they engage, it may be difficult for these new staff members to maintain these emphases, especially if they are in the early stages of academic careers.

Immigration levels are high for academics relative to other professions due to the general trend for more highly educated individuals to be more likely to emigrate than less educated people as a result of employment opportunities, financial resources to pay the costs of migration, and immigration policies geared toward newcomers who are highly skilled and educated (Sriskandarajah, 2005). Various studies have considered the experiences of immigrant or expatriate academics (Fahey & Kenway, 2010; Hoffman, 2003; Richardson & McKenna, 2002), yet these individuals are still considered an “under-researched group” whose experiences are little understood (Richardson & McKenna, 2002, p. 76). Although higher education institutions prioritize internationalization, it is unclear how this affects the work lives and activities of immigrant academics relative to national academics.

Methods

A large-scale international survey on the Changing Academic Profession was administered in 2007 to document academics’ professional backgrounds, work activities and perceptions, job satisfaction, and other considerations. Participants included 25,819 academics working in 19 countries and regions: Argentina (826), Australia (1370), Brazil (1147), Canada (1152), mainland China (3612), Finland (1452), Germany (1265), Hong Kong (811), Italy (1701), Japan (1408), Malaysia (1220), Mexico (1973), Netherlands (1167), Norway (1035), Portugal (1320), South Africa (749), South Korea (900), the United Kingdom (1565), and the United States.
(1146). To the extent possible, randomized cluster sampling was used for each country or region to achieve broad representation according to institutional type, academic field, gender, and rank. A common questionnaire, with country-specific modifications when appropriate, was translated into the relevant language (or languages) for each country or region. (Further details regarding survey administration and preliminary reports from most countries are presented in Research Institute for Higher Education, 2008.)

For the purposes of this paper, we designated three groups of participants within the database:

- National academics whose current country of residence was the same as their country of residence at birth and country of residence at time of first degree (N = 18826 or 87.7%);
- Immigrant academics whose current country of residence differed from their country of residence at birth and country of residence at time of first degree (N = 1479 or 6.9%); and
- Other academics whose current country of residence differed from either country of residence at birth or country of residence at time of first degree, but not both (N = 1153 or 5.4%).

Each of the analyses in this paper compares the situation for national academics to that for immigrant academics. We are most interested in understanding the experiences and work activities of immigrant academics with international backgrounds compared to national academics employed in the countries of their birth. In this paper, we have excluded from consideration the other academics who immigrated prior to completion of a first degree and those who travelled abroad for a first degree before returning to their home countries because we felt their situations could be quite different from those who immigrated after receiving their first degrees and were now working in universities in countries where they had not been born and had not completed their first degrees.

Given the unequal sample sizes between the two comparison groups, all analyses in this paper use a random sample of the national academics (n = 1479) to compare to the full group of immigrant academics (N = 1479). We did not control for completeness of the data sets, so individual analyses have comparable but not identical sample sizes. All immigrant academics were employed full time, as were all national academics selected for these analyses.

The immigrant academics group includes 58 individuals who currently reside in Hong Kong with residence at birth and residence at first degree as mainland China. There were no evident differences in the output from our analyses when we considered these individuals as immigrant academics or excluded them as “other academics.” Given that these individuals explicitly identified a change in their country of residence, we present these individuals as immigrants even though Hong Kong is a special administrative region within the People’s Republic of China. The divergent governance structures and education systems for Hong Kong and for mainland China warrant different treatment of academics in the two regions. We also note that in their preliminary overview of the Changing Academic Profession data for Hong Kong, Postiglione and Tang (2009) specifically compared Hong Kong academics who lived in China at birth with those who lived in Hong Kong at birth. They furthermore reported that mainland China is “an increasing source of recruitment of academics into the profession” (pp. 241–242) in Hong Kong. Since these are the scholars selected to report from Hong Kong, we felt that it was appropriate to follow their lead and distinguish Hong Kong academics who were born
in Hong Kong from those who were born in China. There were no participants currently employed in China who were born and had earned a first degree in Hong Kong.

Global Connectedness

Consistent with prevalent institutional emphases on internationalization, participating academics as a whole displayed a high level of global connectedness in their scholarship and their teaching. Most characterized their scholarship to be international in scope or orientation (63.1% for the current year). Many collaborated with colleagues in other countries as part of their research efforts (56.0% in the current year). A substantial number had coauthored publications with colleagues from other countries (M = 16.3% of their publications in the past three years). Some had received a portion of their external funding from international organizations (M = 8.8% of their funding in the current year). They published a high proportion of their work in other countries (M = 40.6% of their publications in the past three years). Much of their teaching was also internationally focused. Specifically, most participants indicated they had emphasized international perspectives or content in their courses that year (67.9%). Some had taught courses in other countries that year (13.7%). Given the extent of their global connectedness, some had considered moving to academic positions in other countries (28.0%) and some had even initiated concrete action to make such moves happen (10.9%). Several had spent time since their first degree in a country other than the country where they had received their first degree or were currently employed (M = 2.2 years). As well, the participants felt more strongly affiliated with their disciplines or fields than with their institutions: 90.5% rated affiliation to their discipline or field as important or very important, whereas 60.9% rated affiliation to their institution as important or very important. The various measures provided considerable evidence of a globally connected academic work force.

Personal biographical details influenced the extent to which these academics were globally connected. In particular, we found noteworthy differences between immigrant and national academics. Across multiples measures of global connectedness, we found immigrant academics were more globally connected than national academics.

A higher percentage of immigrant academics (M = 70.7%) compared to national academics (M = 55.1%) perceived their research as international in scope or orientation; however, this effect size was small (U = 593575, Z = -7.94, p < .001, r = -.16). Specific measures of the international scope of participants’ research included information about the prevalence of collaboration, co-authorship, and publication across national boundaries. Research by the immigrant academics was more likely to cross national boundaries in each of these ways than research by the national academics (with moderate effect sizes for each statistical comparison). Immigrant academics were more likely to collaborate with international colleagues (70.1%) than were national academics (41.1%), χ²(1) = 218.9, p < .001, φ = .29. Hence, it is not surprising that immigrant academics were also more likely to coauthor with colleagues located in other countries (M = 21.3% of publications in the past 3 years) than were national academics (M = 10.6% of publications), t(2313) = -10.1, p < .001, two-tailed, d = .41. Immigrant academics also published a higher percentage of their publications in other countries (M = 49.5% of publications in the past 3 years) than national academics (M = 30.4% of publications), t(2332) = -11.3, p < .001, two-tailed, d = .46. As well, immigrant academics had received a higher percentage of their funding from international organizations (M = 10.6%, SD = 26.3) than national academics (M =
6.7%, $SD = 19.8$), $t(1870) = -3.70, p < .001$, two-tailed, $d = 1.7$. Across all these measures, the research of immigrant academics was clearly more international than that of national academics, although there was only a small effect size for the differences in self-ratings of the international scope or orientation of their scholarship and the portion of external funding from international organizations. It seems that global migration by academic staff is a major contributor to the internationalization of scholarship and institutes of higher education.

There were small effect sizes for the differences between immigrant and national academics in terms of the international focus of their teaching. Immigrant academics ($M = 73.4\%$) were more likely to emphasize international perspectives or content in the courses they taught than were national academics ($M = 62.5\%$), $U = 722438$, $Z = -7.36$, $p < .001$, $r = -.14$. Immigrant academics were more likely to have taught courses abroad during the current academic year ($M = 19.4\%$) than were national academics ($M = 8.2\%$), $\chi^2(1) = 71.0$, $p < .001$, $\phi = .16$. Small effect sizes were associated with statistically detectable differences on both measures of internationalization of teaching activities.

Beyond teaching, collaborating, or publishing in other countries, there were also moderate effect sizes between immigrant and national academics in their propensity to consider international moves for work. Immigrant academics were more than twice as likely as national academics to have considered moving to an academic position in another country ($39.3\%$ vs. $16.6\%$), $\chi^2(1) = 179.1$, $p < .001$, $\phi = .25$. The difference was even more striking for those who had taken concrete action to initiate a move to an academic position in another country: $17.9\%$ of immigrant academics had taken concrete action compared to $3.8\%$ of national academics, $\chi^2(1) = 141.1$, $p < .001$, $\phi = .23$. The differences in these propensities toward international moves may be related in part to the differences in the participants’ affiliations to the discipline or field compared to their affiliation to their institutions. Immigrant academics defined themselves as more highly affiliated with their discipline or field ($M = 91.7\%$) than did national academics ($M = 89.3\%$), $U = 876008$, $Z = -3.53$, $p < .001$, $r = -.07$. In contrast, immigrant academics were less highly affiliated with their institution ($M = 55.1\%$) than were national academics ($M = 66.7\%$), $U = 876185$, $Z = -7.34$, $p < .001$, $r = -.13$. While these effect sizes are small, the trend is evident.

For the most part, data from the Changing Academic Profession survey do not reveal whether immigrant academics are connected with the nation of their birth or first degree, or if they are connected with some other nation or nations. There is evidence, however, that immigrant academics had spent more time since their first degrees in countries other than the ones where they had obtained their first degree or were currently employed ($M = 3.3$ years, $SD = 5.5$ years) compared to national academics ($M = 1.1$ years, $SD = 3.1$ years). This difference is statistically detectable with a moderate effect size, $t(2309) = -13.6$, $p < .001$, two-tailed, $d = .50$. Hence it is clear that at least some of the immigrant academics were connected with the world, not just their home countries.

It is evident that the immigrant academics reported extensive international connections for their research and teaching that surpassed the kinds of connections reported by national academics. Clearly, immigrant academics are contributing more to the internationalization agendas of their institutions than national academics, in terms of internationalization at home and internationalization abroad (Altbach et al., 2009).
Global Connectedness and Other Work Factors

We also sought to explore any differences in workload, career progress, or job satisfaction among the respondents. The single-item measures of career progress and job satisfaction did not reveal any differences between immigrant and national academics, but there were clear differences in workload between the two groups.

Workload

Participants across both groups worked an average of 44.8 hr/week while classes were in session; this included an average of 18.5 hr/week for teaching, 14.5 hr/week for research, 2.8 hr/week for service, and 6.2 hr/week for administration. Immigrant academics worked about 3 more hours each week than national academics ($M = 46.6$ hr/week, $SD = 15.6$, and $M = 43.2$ hr/week, $SD = 17.6$, respectively), $t(2617) = -.11$, $p < .001$, two-tailed, $d = .20$. While classes were in session, there were no differences between immigrant and national academics in time devoted to teaching, $t(2625) = .511$, $p = .610$, two-tailed, or to service, $t(2545) = .885$, $p = .376$, two-tailed, but there were differences with a moderate effect size for time devoted to research, $t(2581) = -5.31$, $p < .001$, two-tailed, $d = .21$, and a small effect size for time devoted to administration, $t(2580) = -4.03$, $p < .001$, two-tailed, $d = .16$. Immigrant academics spent more time on research compared to national academics ($M = 15.8$ hr/week, $SD = 12.3$, and $M = 13.3$ hr/week, $SD = 11.6$, respectively), and more time on administration ($M = 6.8$ hr/week, $SD = 7.5$, vs. $M = 5.7$ hr/week, $SD = 7.0$, respectively). The difference was even stronger (with moderate effect sizes) when classes were not in session, with immigrant academics working 44.4 hr/week ($SD = 16.0$) compared to national academics working 39.1 hr/week ($SD = 19.9$), $t(2012) = -6.97$, $p < .001$, two-tailed, $d = .30$. This difference reflects more time devoted to research for immigrant academics (26.1 hr/week, $SD = 15.4$) compared to national academics (20.9 hr/week, $SD = 15.1$), $t(2263) = -8.06$, $p < .001$, two-tailed, $d = .34$.

Career Progress

The differences in academic ranks across nations limit the kinds of meaningful comparisons we could make about career progress. About half of each group was tenured (50.9% of immigrant academics and 50.4% of national academics). There were no differences in tenure rates between immigrant and national academics, $\chi^2(1) = .09$, $p = .766$.

Job Satisfaction

Participants were also asked to rate their overall satisfaction with their current jobs. The majority (65.4%) rated their satisfaction as high or very high, with no differences in the ratings between immigrant and national academics, $U = 1038835$, $Z = -.04$, $p = .969$. 

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Conclusions

The Changing Academic Profession survey provided considerable evidence of a globally connected academic workforce. The increased emphasis on internationalization (Center for Internationalization and Global Engagement, 2012; Höhle & Teichler, 2013) was reflected in the actions and perceptions of participating academics. There were differences, however, between immigrant and national academics. Across multiple measures, the immigrant academics were more globally connected than the national academics. The immigrant academics also worked longer hours, especially on research tasks. Despite these differences, which would be expected to favour the immigrant academics over the national academics, there was no evidence of differences between the two groups on measures of career progress or job satisfaction.

Internationalization initiatives for higher education institutions depend upon the commitment, engagement, and expertise of academic staff (Altbach et al., 2009; Center for Internationalization and Global Engagement, 2012; Egron-Polak & Hudson, 2010). Given the high levels of immigration within the academic profession, institutions can advance their internationalization quotients (Knight, 2001) by capitalizing upon the experience of immigrant academics and valuing the global connections of these scholars. Immigrant academics are well poised to contribute to internationalization at home as well as internationalization abroad (Altbach et al., 2009).

With such clear evidence of the global connectedness of immigrant academics, institutions should expect a higher yield in terms of career progress and job satisfaction, yet no such evidence was present in the Changing Academic Profession survey. It is not possible, however, to determine whether the absence of such benefits for these academics is the result of measurement limitations or prejudice.

The Changing Academic Profession survey included a single question to assess job satisfaction. General principles of measurement warn against reliance upon an individual item to measure a complex construct. While some research has shown that single-item measures of job satisfaction have acceptable validity (Nagy, 2002), other empirical studies have identified the limitations of reliance upon a single item (Oshagbemi, 1999). Specifically, Oshagbemi (1999) found a single-item measure relative to a multiple-item measure overestimated job satisfaction and underestimated both job dissatisfaction and indifference. Accordingly, results from the single item on the Changing Academic Profession survey do demonstrate the kind of “rosy picture” that Oshagbemi found, with 65.4% of participants rating their job satisfaction as high or very high. In fact, the ratings on the Changing Academic Profession survey were sufficiently high that a kind of ceiling effect may be at play, which could explain the absence of any differences between the immigrant and national academics.

There were also challenges with measuring career progress in the Changing Academic Profession survey. The only measure of career progress that we could use was tenure rates. About half of the academics held positions with tenure, regardless of whether they were immigrants or nationals. Academic rank is a clearer measure of career progress, however, the lack of comparability in academic ranks across the 19 countries means that career progress could be assessed only within individual countries and not at the broad international level. The scope of the current paper and the relatively low numbers of participating immigrant academics in some countries did not allow us to undertake these more detailed comparisons, which is a focus that could be taken up by the individual country research teams.
Despite these measurement shortcomings, it is still possible that career progress is stunted for immigrant academics due to some level of bias or prejudice. Based upon his review of published studies in Australia, the U.K., and the U.S., Shaikh (2005) identified an inherent bias that undermined the career progress of immigrant and foreign academics as assessed through peer review. He argued, “academics arriving into local institutions are likely to be seen as taking local jobs, increasing competition and winning an undeserved share of research funds. This makes it very difficult to rely on peer review for judging performance” (p. 26).

As Yang and Welch (2010) found, there is a strong pull to the “home country” for many globally mobile academics. Yet, anecdotal evidence suggests immigrant academics travelling to countries where they have lived in the past or undertaking research collaborations with scholars based in their former institutions may be perceived as selfishly focused upon ways to fund trips “home” to visit family and friends rather than contributing to the internationalization agenda of their institutions. There is an assumption that immigrant academics have not had to work as hard as national academics to establish or maintain these international connections, and hence the international work they do often goes unrecognized or remains undervalued. If institutions are committed to internationalization, then they need clear mechanisms to recognize, support, and reward the international experience and activities of immigrant academics on their campuses. Foregrounding the international experience and expertise of immigrant academics as part of hiring and promotion decisions, and rewarding the international contributions made by these academics throughout their careers are achievable objectives for institutions.

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References


Precarious Learning and Labour in Financialized Times

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Abstract

Our current globalized economic regimes of financialized capital have systematically altered relations of learning and labour through the dynamics of precarity, debt, and the political economy of new wars. The risks of these regimes are absorbed unevenly across transnational landscapes, creating cartographies of violence and dispossession, particularly among youth, indigenous, working class, and racialized women. Presently there is surprisingly little discussion on the relevance of financialization for adult educators. Transnational resistances organizing against neoliberal restructuring, austerity policies, and debt crises are emerging at the same time that massive investments are being made into homeland security and the carceral state. This paper opens up discussion on the implications of financialized times for educators, and develops an analytic framework for examining how these global realities are best addressed at local sites of adult and higher education.

Key words: financialization, imperialism, neo-colonialism

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Precarious Learning and Labour in Financialized Times

The financialization of capital goes hand in hand with the topic of neoliberal economics, and yet has received comparatively little attention. The literature on adult and higher education reflects this trend in that there is by now quite a large literature documenting the consequences of neoliberal economic policy on higher education (e.g., Slaughter & Rhoades, 2004; Currie & Newson, 1998). However, there is relatively little literature examining how the financialization of capital has been a significant dynamic shaping adult and higher education. This paper develops some organizing frameworks through which we can better understand the implications of financialization for adult and higher education in terms of its gendered and racialized transnational materialities. The most critical organizing frame introduced in the paper is that which connects financialization to the literature on monopoly finance capital, and the implications for understanding the material underpinnings of ‘the new imperialism’ (Harvey, 2003).

Financialization can be broadly defined as the increasing importance of financial markets in the sum total of international economic activity (Dore, 2000). It can also be understood in terms of the importance of the stock market with regard to capital accumulation. Accumulation in stock market terms entails beating a game of averages, and in the late twentieth century, particularly after the dissolution of the direct convertibility of the U.S. dollar to gold, being ahead in the game depends less on how many units are sold; rather it resembles a bet on who’s things are going to sell relatively faster, or, a bet on future earnings (Bichler & Nitzan, 2004). Everything is up for financial speculation within the so-called FIRE economy (Finance, Insurance, Real Estate), including social crises, wars, debt, and even natural disaster (Klein, 2007). Described as a systematic transformation of mature capitalist economies (Lapavitsas, 2011), financialization is sometimes discussed as a recent phenomenon. However, given that Lenin provided a detailed analysis of financialization as a critical dimension of monopoly capital in his famous treatise on imperialism, it is more appropriate to understand financialization as an historical process and not a brand new phenomenon. This paper takes the position outlined by Bellamy Foster (e.g., 2007; 2010) that the financialized form of capital is not a new stage in capitalism in that the basic problem of accumulation within production remains the same. However, financialization is an emergent form of the monopoly stage, and in this sense the term ‘monopoly finance capital’ is appropriate.

Linking financialization to monopoly capital is critical to the analysis provided in this paper in that monopolization is the historical process crucial to understanding the globalized organization of neocolonialism as imperialism (Nkrumah, 1965). Although it may appear on the surface that the form of monopoly finance capital of Lenin’s day differs in certain ways (to be described later) from its present-day form, the social relations of imperialism organized through production and monopolization remain very much the same. I therefore use imperialism as a key concept to understand the social relations of power organized through monopoly finance capital, and in particular transnational relations organizing gender, race, and neocolonialism (Mojab, 2011). I follow the analysis through to examine the implications for adult education in an era of international relations of global finance capital.

The paper is organized into the following three sections. First I will provide an outline of financialization as experienced at the level of the everyday. I will then summarize financialization as an economic process organizing relations of imperialism through the
concentration of capital accumulation into fewer and fewer hands. Finally, I discuss the implications of financialization for adult and higher education in an era of globalization.

Understanding Finance Capital at the Level of the Everyday

To put it bluntly, youth around the world are angry. The world is witnessing an unprecedented rise of youth and student revolts in regions as diverse as: California, Egypt, United Kingdom, Chile, Quebec, Wisconsin, Italy, Jamaica, North Africa. Spain, Russia, South Africa, Barbados, Colombia, New Delhi, China, Iceland, Greece, Ireland, Toronto, and Indigenous youth from Bolivia to Oka. Movements such as the Jasmine Revolution, Quebec Riots, Pussy Riot, Arab Spring, Occupy Wall Street, and Idle No More are all illustrative of this growing trend of disenchanted youth actively voicing their discontent with the current global economic situation and the compulsion of lowered expectations.

In the years preceding the global economic crash of 2008 tensions had been building. Manufacturing infrastructure (e.g., fixed capital) had been eroding leading to factory closures, lay-offs, and off-shored production (Harvey, 2010; Marazzi, 2010). As the unionized manufacturing sector declined, wage repression and worker discipline intensified (Panitch, Albo & Chibber, 2012). Free zones have been emerging everywhere from Jamaica to Winnipeg, Manitoba (http://www.foreigntradezone.ca, accessed August 8, 2012). The environment has been degraded to a point where youth have unprecedented health problems ranging from asthma to autism (Goldin-Rosenberg, 2008); they face an uncertain future due to the known and unknown effects of exposure to radiation and toxins that leak into rivers, lakes, landfill, and industrialized bioengineered agricultural products. With subsistence living almost universally eradicated, the sale of labour has become necessary for the sustenance of life; however, the possibility of landing a full-time, Keynesian era job has, in colloquial terms, come to resemble a crapshoot. Instead, youth, racialised migrant workers, and particularly women, are increasingly working at a string of temporary, part-time jobs to make ends meet. This scenario is referred to as the intensification of precarity: precarious employment and precarious housing. Living on the edge of survival and disaster has become a globalized reality.

In Canada, attending college or university is no longer the semi-guaranteed pathway to economic security. As the Keynesian welfare state continues to undergo neoliberal restructuring, the state is systematically offloading the cost of higher education onto students (Magnusson, 2000a; 2000b; 2005a; 2005b; 2005c; 2011). Youth are handling the rising cost of higher education by taking on crushing debt loads (Canadian Federation of Students, http://cfs.bc.ca/section/48). In Canada, although some of the debt is acquired through public sources of credit in the form of government student loans, increasingly students are availing themselves of credit from predatory private-for-profit sources: credit card companies, for-profit publicly traded student loan corporations such as Sally Mae, multiyear cell phone and internet contracts, and a plethora of retail credit cards. If students manage to finish their degrees, they find themselves in debt servitude (Hedges & Sacco, 2012), and their chances of securing full time employment have negligibly improved (Magnusson, 2011).

In addition, jurisdictions such as Ontario, through the Higher Education Quality Council (HECQO), are pushing for a “more differentiated” higher education system. This policy language is reflected in Premiere McGuinty’s throne speech (2010) in which his government outlined a plan to shift the manufacturing intensive economy to a knowledge-based economy by increasing local postsecondary participation rates to 70%, while at the same time pursuing the
lucrative international student market. We know from HECQO position papers that increasing participation rates in higher education entails proposals such as creating an online provincial undergraduate system, hiring teaching-only professors, and accepting cash from anyone currently ineligible for traditional universities; in the meantime traditional universities are developing ever more layers of differentiation, with exclusive and gated sectors of the system serving an elite minority (Magnusson, 2011). At a time when over half of the traditional university undergraduate programs are already taught by precarious workers of the knowledge economy, this gesture can only be seen as one that will potentially intensify the production of tiers among knowledge workers: those paid to teach and those paid to do research. In a system within which the vast majority (80%) of full professors within traditional universities are male and white, and over 50% of the precarious professors are women and racialized faculty, questions of equity regarding knowledge production and cultural representation have never been more critical, and at the same time more violently suppressed as evidenced in Quebec as well as in many international jurisdictions (Magnusson, 2011, statistics from the Canadian Association of University Teachers website, accessed 2011).

Within this environment, challenges to a state fiercely intent on pushing through austerity policies are met with state repression and violence. In Quebec, the passing of Bill 78 legitimized unprecedented state violence against student protestors, criminalizing scores of youth whose main ‘crime’ was to challenge the neoliberal trajectory of economic and education policy by staging a strike. In Russia, the Pussy Riot, a female punk band accused of storming a cathedral and beseeching ‘the virgin Mary’ to rid Russia of Vladimir Putin, were sentenced to jail. Students attending the Occupy Movement in California campuses were mercilessly pepper sprayed. In Chile police are using water canons and tear gas to disperse student protestors. In London and Montreal police ‘kettled’ (or corralled) student protestors, arresting hundreds. During the G20 Toronto police corralled hundreds of people, protestors and bystanders alike, and exercised arbitrary detainment. In Syria, protest is met with massacre. In Guantanamo Bay, prisoners are detained, tortured, and their legal and human rights suspended. Superprison construction is on the rise in Canada, the U.S., and the U.K. These events illustrating the state’s investment into technologies of securitization are also evidenced in terms of heightened surveillance.

For example, in addition to the criminalization of student and youth protestors, “Not in Education or Employment or Training” (NEET) lists, initiated in the UK have quickly spread to other jurisdictions, are being assembled, consisting of the names of 16 to 24 year olds not in school (Colley, 2003). Youth designated as “NEETS” are of interest to ‘authorities’ because they are seen as more likely to commit crimes. The NEET lists serve to extend and intensify the surveillance and criminalization of precarious youth. Criminalization of the poor, of course, has a long history within capitalist societies, serving as a means to regulate a surplus army of workers when the labour market is unforgiving.

More current analyses emphasize the gendered and racialized organization of policing and imprisonment. For example, Sudbury (2005) discusses the global explosion in women’s imprisonment, but also the intensification of this phenomenon within the U.S. global epicenter. She writes:

Beginning in 1973, an explosion in the number of women in prisons and jails in the United States has contributed to one of the largest prison building booms in world history. Whereas in 1970 there were 5,600 incarcerated women, by June 2001, 161,200 women
were held in U.S. prisons and jails, representing a staggering 2,800 percent increase. (pp. xiv)

She points out that the number of imprisoned males has likewise grown exponentially, with the total population of jails and prisons in the U.S. surpassing two million. However, she adds, while “women make up only 9% of those incarcerated nationally, the rate of population growth for incarcerated women outstrips that of men” (pp. xiv). While the intensity of these trends is felt most acutely in the U.S., Canada and the U.K. are following the same pattern. Prison growth in the global south, while less visible, Sudbury argues, is equally problematic, with increasing numbers of U.S. style megaprisons. She continues:

Statistics that look at gender but not race and class underrepresent the impact of the prison explosion on women of color and indigenous women. In all countries just mentioned, oppressed racialized groups are disproportionately targeted by the criminal justice system. The crises of women’s prisons can therefore be read as a crisis for working class women and indigenous women worldwide. (pp. xiv)

Described by Carpenter (2012) as the dialectic of security and insecurity, the themes of precarity and debt on the one hand, and securitization on the other, are woven through the dynamics that I am referring to as the financialization of everyday life. Financialization, as I mentioned earlier, is a broad organizing set of economic relations, but the effects of these relations are experienced at the level of the everyday, and are reorganizing social relations of learning and labour, as hinted above. The picture emerging on the ‘insecurity’ side of the dialectical coin is one of precarious existence at the rugged edges of casualized work and unemployment, lack of affordable housing, erosion of social programs, community programs, and unprecedented exposure to a proliferation of predatory speculative credit markets: money is to be made speculating on the ‘future earnings’ derived through production of insecurity and dispossession (Khosla, 2005; 2008). The picture emerging on the ‘security’ side of the coin is the intensification of technologies of social and political control through what could be thought of as full spectrum practices of imperialism: surveillance, prisons, riot control, and so on. These technologies and practices of imperialism are being innovated through the speculative dynamics of the market, and used as instruments of coercion to maintain an accumulation regime that thrives best on insecurity, social crises, war, and even disaster. Money is to be made speculating on the ‘future earnings’ of security.

The next section takes a closer look at financialization in order to better understand how it is that accumulation regimes speculating on precarity and debt are linked to accumulation regimes speculating on securitization. The final section of the paper then considers the implications in terms of Adult and Higher Education.

Financialization and Transnational Relations of Imperialism

David Olive (2012) reports in his article in the Toronto Star:

Most recently, Carney, stating the obvious, said Wednesday that Canada has no hope of achieving global competitiveness if Corporate Canada insists on continuing to sit on more
than half a trillion dollars of idle cash rather than investing it in our country’s future, 2012).

This report in a local paper reiterates the point repeatedly made by Harvey (e.g., 2003; 2010) that the era of financialization is not characterized by an absence or curtailing of ‘surplus capital’ but rather the opposite: too much surplus and not enough re-absorption or reinvestment. Using a version of an analysis commonly attributed to Rosa Luxemberg (1912), Harvey points out that the problem we currently face economically speaking is one of “how” to invest the surplus that is accumulating. Olive points out that Corporate Canada is sitting on more than a half a trillion dollars that is idle, and yet governments internationally are negotiating debt crises of epic proportions, instituting austerity measures that are breaking the backs of labour, and at the same time throwing money into homeland security, super jails, surveillance, and wars. How do we account for these contradictions? As Carpenter (2012) suggests, these contradictions relate dialectically, representing two sides of the same accumulation coin. In order to understand this dialectical relation, we need some basic understanding into the dynamics of financialization.

As mentioned earlier, financialization can be broadly defined as the increasing importance of financial markets in the sum total of international economic activity. In his reviews on the topic, Bellamy Foster (2007; 2010) emphasizes that financialization does not represent a new stage of capitalism, citing that the basic problem of accumulation within production remains the same. Rather, he argues, financialization represents an emergent form of the monopoly stage, and therefore recommends the term ‘monopoly finance capital’. A century ago, Lenin (1916) had analyzed the tendency of capital toward monopolization, and cited its importance as the economic basis for imperialism. Mojab (2011) argues that transnational imperialism then, and today, is dependent on strong nation states with developed militaries that are organized hierarchically: this is the so-termed “strong state thesis” of globalization. She states:

(S)ome theorists claim that imperialism is in the process of transforming into a new regime called ‘Empire’, characterized by eroding national borders and a dissolving nation-state system, which will leave the imperialist order without leaders or centers. This is an optimistic, ‘post-imperialist’ scenario in which sovereignty is deterritorialized, leaving room for increasing mobility of labor, fluidity of capital, ongoing migration, and organizing on an international level. In this context of the withering away of the nation-state, human beings are said to be able to realize the dream of building a world that will turn its back on pillage and piracy and move toward equality and justice. (pp. 170)

In contrast to the erosion of borders, we see massive investment into systems of homeland security, and a sustained commitment to fortify spheres of economic and political influence (Meiksins Wood, 2003). Mojab (2011) points out that borders within the European Union have dissolved to encourage free trade, but the EU has been closing its doors to economic migrants and refugees.

Lenin established that the formation of monopolies, and therefore relations of imperialism, is inherent to the capitalist system and is organized through the economic relations of financialization. Bellamy Foster (2007; 2010) points out that through the post-war Keynesian period, the formation of multinational monopolies, or oligopolies, resulted in a concentration of profits for a minority of monopoly beneficiaries. As he describes, as capital becomes
concentrated into fewer and fewer hands, the conditions that allowed for this accumulation to occur in the first place produces a barrier to re-investment. That is, concentration of capital into fewer hands eventually results in economic stagnation: consumption slows down, production slows down, and the overall effect is fewer profitable investment opportunities. In terms of the Olive article cited above, imagine how Corporate Canada may hesitate to reinvest the accumulation of corporate dollars into the auto-industry, or the manufacturing sector generally speaking. Southern Ontario’s auto-sector is being completely re-organized: downsized and outsourced. It now does not make accumulation sense to reinvest in the productive capacity that produced the surplus in the first place: there would be diminishing returns. The result is even greater stagnation. In order to displace the effects of this stagnation, the now precarized workers require access to credit in order to keep consumption lively, and investors look to investing in the financial sector, rather than, say, the manufacturing sector.

Bellamy Foster suggests:

For the owners of capital the dilemma is what to do with the immense surplus at their disposal in the face of a dearth of investment opportunities. Their main solution from the 1970’s on was to expand their demand for financial products as a means of maintaining and expanding their money capital. On the supply side of this process, financial institutions stepped forward with a vast array of new financial instruments: futures, options, derivatives, hedge funds, etc. The result was skyrocketing financial speculation that has persisted now for decades. (2007, pp. 3)

Sweezy (1994) points out that over the history of capitalism, financial expansion was contemporaneous with growth in the productive sector. However, in late capitalism, financial expansion is occurring against a backdrop of decline in the productive sector (see also Harvey, 2010). That is, as Bellamy Foster (2007) suggests, financialization in late capitalism, rather than feeding on and contributing to economic health, is feeding off economic stagnation. Meiksins Wood (2003) argues that the global penetration and intensification of global finance monopoly is dependent on a hierarchically arranged system of nation states controlled through the U.S. epicenter (see also Harvey, 2003). She states:

The U.S. used its control of financial and commercial networks to postpone the day of reckoning for its own domestic capital, enabling it to shift the burden elsewhere, easing movements of excess capital to seek profits wherever they were to be found, in an orgy of financial speculation. (p. 133).

She argues that the U.S. develops trade rules (e.g., the structural adjustment policies, GATS, etc.), foreign aid, etc., to manipulate debt and financial speculation in ways that open subordinate economies for exploitation. Maintaining control over processes of intensified penetration requires what Meiksins Wood refers to as “surplus imperialism” that manifests in a state of permanent war. As she suggests, it is in the interest of the hegemon to not obliterate nation states, but to reinforce nation states at the same time as keeping challenges to imperialist supremacy in check. Neoliberal policies therefore become a necessary means of opening up subordinate economies, and to shift the burden of financialization internationally.

Bhattacharyya (2005) has argued that the globalized war economy refers to the opposite of the military industrial complex—‘something like the war economy of the poor world’. Whereas
financialization is historically associated with expansion in the productive sector (Sweezy, 1994), the new war economy creates wealth against a backdrop of precarity and economic stagnation (Melman, 2003). Rather than an enemy state, war is waged against the life of the population itself (Cooper, 2008). The new wars have been linked to the erosion of local infrastructures, to food crises, environmental catastrophes, social upheaval, and the continual threat of counter-neoliberal rebellion (see also Cooper, 2008).

Education, through the implementation of neoliberal policies, enters into the speculative arena of finance capitalism, as does the war against the poor world, and the two become inseparable. In his ethnography of the Chicago urban school system, Means (2011) reveals how schools in the poor neighborhoods he taught in and came to study are the site of heightened surveillance practices within a political economy that has woven public education through emerging forms of prison industrialism and militarism. Saltman (2010) has documented how venture philanthropy is a significant vehicle through which the school systems in the same state are rearticulated as private enterprise, thereby encouraging education to enter into the economic relations of financialization. Reading across these two authors, we can see how education and the political economy of new wars become woven together through the relations of monopoly finance capitalism. Meiners and Quinn (2011) make the connection between permanent war economy, education, militarism, and prison:

The U.S. power structure has systemically starved civilian infrastructures that support our daily lives, from roads and public transportation and schools to libraries; it has abandoned communities to decay or private dollars. At the same time our prison and military infrastructures have grown, and are poised to fill the civilian void. With over 1.68 million men and women in military service, eleven hundred bases across the globe, and only six thousand foreign service officers and two thousand U.S. Agency for International Development (USAID) workers, the military is U.S. international aid, diplomacy, and foreign relations. There are more members in military bands than the State Department has foreign service officers. The armed forces are deployed for war and military intervention and for domestic and worldwide natural, political, and other disasters, including Hurricane Katrina, and Haiti’s and Japan’s earthquakes. Omnipresent and well-supported, this is military normal. (p. 1)

The austerity policy environment encourages claw backs in public funding to education and community infrastructure at the same time that a surplus is accumulating. Meiners and Quinn (2011) outline the degree to these surplus monies are being invested into infrastructure for carceration and militarism:

Not unlike the permanent war economy that has reshaped our democratic institutions, the carceral landscape has remade possibilities for young people. Between 2000 and 2005, a new prison was built in the United States every twelve days. These massive investments in a carceral state, and the corresponding “tough on crime” criminal justice policies, created “million dollar blocks”—impoverished neighborhoods with so many residents in prison that the total cost of their incarceration exceeds $1 million. Far from reducing big government, the shift from a welfare to a carceral and military state has translated into dramatic increases in the government’s role in the lives of the poor.
As these authors point out, for youth from neighborhoods that have been starved through ‘austerity’, choosing a well-funded military school over a school that lacks resources and feels like a prison is a rational choice. Similarly, for the economically elite, choosing a well-resourced gated university with corporate owned 5-star hotel-like student housing over an online undergraduate program taught by precarious knowledge workers, is a rational choice. At the same time, as examined by Carpenter (e.g., 2011) and Colley (e.g., 2011), opportunities for civic service and mentoring within communities have become streamlined through organizations such as Americorp and New Beginnings. These sites of adult education leave no room to leverage the kind of critical tools and engagement necessary to produce a citizenry that is able to work through and transform the social relations of global financial imperialism. As adult educators and scholars we need to reject sites of education that support financialized educational programs that manage rather than transform communities and affirm the fullest of human potentiality.

The global landscapes emerging under regimes of financial monopoly capitalism are bleak. These landscapes, however, emerge through contradictions and unpredictable opportunities to reinvent social and political spheres. Distinguished from a formal, uniform, systematic and inevitable process, the contradictions of capitalism manifested by the formal and the informal, the legal and the illegal, inter alia, offer opportunities for creative intervention by those of us committed to adult and higher education to organize praxes that offer literacy, engagement and invention appropriate to transforming precarious learning and labour in financialized times. The next section explores some of these opportunities.

Tasks for Adult and Higher Education

Not surprisingly, the advent of bleak times has given birth to revolutionary ethos and solidarity, and particularly among young people. I recently participated in conferences, teach-ins, and actions lead by part-time faculty and students: these sectors that comprise the majority of campus life are also absorbing the lion’s share of the injurious consequences of financialized higher education. We are now seeing evidence of solidarity across these differently affected groups of knowledge workers, many in even the most privileged sectors are beginning to support actions aimed at countering what is increasingly understood as a systematic starvation and erosion of the democratic civic functions of colleges and universities. Constructing assemblies outside of university governance structures and connecting with communities, these activists are challenging the state and in the process transforming higher education and communities alike, as evidenced in Quebec. Students in Quebec are building solidarity across diverse sectors of workers, and supporters outside of Quebec wear their red patch of solidarity. On another front, Democracy Now reported that 300,000 students and public service workers rallied at the Wisconsin Statehouse in Madison to oppose the elimination of bargaining rights and the claw back of wages and pensions. Just when crowds might have expected attempts to exercise crowd control and blocked access, indicating contradictions in the ruling class, the police ceded control of the State Street doors. From the Arab Spring to Occupy, this past year has been one of challenging repressive economic regimes, and activists globally are learning from one another and teaching one another. At my own university, a General Assembly consisting of students and faculty began meeting outside formal governance structures, and hosting workshops and mini-courses to learn about how neoliberal policy is impacting education. From these meetings, students connected across different institutions by hosting a conference entitled “The University is Ours”. At the conference, students and faculty presented insightful analyses and creating
analytic frameworks appropriate to the field of education in an era of precarious learning and labour. They also organized workshops around strategies of resistance and intervention, with constituents from different jurisdictions helping one another work through what needed to be done within local sites of resistance. Similar actions are taking place across campuses globally. These are fruitful sites of adult and higher education teaching and learning.

Mojab (2011) has argued that there is by now a large body of literature within adult education that engages with capitalism. As she points out, however, this literature typically does not engage with capitalism as imperialism and therefore cannot produce the analytic tools necessary to properly address the complexities of financial monopoly capitalism as a historical process. I myself have been guilty of my share of writing articles examining commodification of higher education as if the process of deepening market relations through neoliberal restructuring has somehow been separate from the political economy of the new wars. One might ask: Why this division? What are the social relations through which my critical gaze on commodification and market relations comes to be alienated from war realities?

In a recent article examining the policy discourse of “innovation” that has drenched our academic landscapes of colleges and universities, I point out how Canada’s Innovation Strategy: released just after 9-11, articulates innovation with biosurveillance within a political economy of new wars (Magnusson, 2012). The policy (Government of Canada, 2012) reads:

For the first time in 25 years, Canada is in the midst of a slowdown that is happening concurrently in every major market in the world. More than 40 percent of Canada’s economic activity is generated by exports, and these have been hit hard by the global slowdown. This was reflected in our weaker performance in the first half of 2001. The events of September 11 further affected our performance, particularly in sectors such as transportation and tourism. In this period of uncertainty it is important to restore a sense of personal security, and that was a key goal of the Government of Canada’s 2001 budget. (p. 12)

The policy goes on to articulate innovation in the area of surveillance as both an economic strategy and a state necessity. For instance, improved security measures at airports, including facial recognition systems, iris scans, and automatic thumb printing are examples of the kinds of technological innovations cited in the policy

College and university environments are saturated by and in the discourses of ‘innovation’ and ‘knowledge economy’. The policy language of ‘innovation’ is now institutionalized in terms of ministry, biomedical, and campus offices of innovation. Many universities now have white papers aimed at reshaping institutions vis-a-vis the needs of a ‘knowledge economy’. Analyses are emerging revealing the market relations shaping the policy discourses that articulate ‘knowledge economics’ and ‘innovation’ with neoliberal economic strategies. We need, however, to enrich our analyses to reveal the accumulation regimes’ undergirding of precarious learning and labour within a context of the political economy of new wars. As a faculty member situated within a Canadian research-intensive university, and having emerged from the working class at the tail end of the Keynesian era, I have felt the tectonic shift produced through the Nixon shock and its afterwaves of financialization. Thus, until the realities of the political economy of permanent war enter into our collective experiential sphere, the predominantly white intelligentsia occupying full-time tenure track positions within universities may not orient their publicly paid for knowledge work to these problems. Only when the imperialist relations of
financialized capital have deepened so significantly that the damage and destruction felt by the rest of the world has finally entered into the gated communities of (privileged) academia will it be possible to engage the organized solidarity of these ‘innovators’ working for the ‘knowledge economy’.

Conclusion and Recommendations

In the meantime, there are countless sites of engagement for adult and higher education workers who are “getting it”. We need to be there at those sites, learning, leading, and transforming the financialized trauma that is hitting our communities hard. We can begin by educating ourselves on the topic of financialization and developing counter imperialist curriculum and pedagogies. We can develop sites of higher education that are deeply engaged with sites of adult education and community development. We can demand that the financial wealth accumulating through our centres and hubs of innovation be taxed so that at least half of the revenues are invested in infrastructure that serve public interests.

With regard to the last point, consider the Kitchener-Waterloo area wherein Waterloo has become the international, speculative hub of innovation, and Kitchener has become the object of neoliberal austerity as the manufacturing sector is starved into decline. Kitchener-Waterloo is a textbook example of a local geography of financialized higher education in relation to the community within which innovation hubs are constructed. Newson (Newson, Polster, & Woodhouse, 2012) has recently argued that rather than viewing our universities as endangered, we may need to understand better their role as endangering the communities within which they are situated. The wealth produced through Waterloo innovation can and should be reinvested in democratically designed community infrastructure rather than expansion of a militarized carceral state.

Adult educators are uniquely positioned to address the creep of bleak times through public pedagogy and engagement. We can advocate for state regulated systems of loans that benefit rather than hurt debtors in their pursuit of education and training and economic success. We can advocate for tax reforms to ensure some of the wealth produced through hubs of innovation are reinvested back into communities hosting these centres. Our faculties of education can develop curricula that nurture and develop our communities, rather than curricula that support a global vision of knowledge economics that is productive of economic stagnation and social crises at the level of the local. The amount of work ahead of us is matched by the ingenuity and political will of youth connected through global cartographies of struggle, and who are already leading the way.
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Negotiating the Confluence: Middle-Eastern, Immigrant, Sexual-Minority Men and Concerns for Learning and Identity

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Abstract

Sexual-minority male immigrants re-locating from the Middle East to the United States and Canada have particular experiences upon entry and integration into their new societies. The needs of learning and identity are highlighted through a multiple case approach involving three men. Interviews were conducted with the three participants, which were analyzed by the authors using qualitative case analysis. The data highlights the unmet expectations for life as a new immigrant, as well as the complexities of becoming involved in sexual-minority settings. Their learning experiences may be explained using a theoretical framework of transformative learning. These findings suggest that sexual-minority immigrants have complex needs, such as identifying with appropriate communities and deconstructing false representations of “gay rights” and citizenship in popular culture. Educational and social programs could address these needs when considering what might be important for immigrant adult learners.

Key words: homosexuality, adult education, transformative learning, immigration

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Introduction

Sexual-minority males immigrate to developed nations from less developed nations for a variety of reasons. We hold that sexual-minority males that immigrate to the United States and Canada from Islamic Middle Eastern countries are a group largely hidden in scholarship on sexual-minorities and mobility. This is a study of three immigrants who face the challenges of integrating into life in the United States and Canada as sexual-minorities. The cases, in part, point out the degree to which North American and sexual-minority culture are hospitable to sexual-minority male immigrants from the Middle East. Immigration is often characterized by complex bureaucratic systems that are designed to make the complex process labour intensive, expensive and difficult (Epps, Valens, & González, 2005). This means that although some sexual-minority males will be able to successfully cross borders, most applicants cannot due to the complexity. For sexual-minority males in particular, this process becomes increasingly difficult because they must determine whether identifying as a sexual-minority male through, for example, describing their same-sex partnership status on an application form, will negatively affect their application due to the pervasive nature of homophobia.

Keeping in mind this context, the purpose of this paper is to explore the lives of Middle Eastern, sexual-minority, male immigrants to the United States and Canada. Our use of the term immigrant is not without awareness of the political ramifications. Within the Canadian context, the term immigrant has two distinctive definitions in the literature: (a) a “transitional category” that refers to individual being admitted into one country and yet have not received citizenship and (b) a “folk version” whereby “someone who is ‘foreign looking’ or non-white” (Han, 2012, p. 136). In this paper, we utilize the folk version, but keep in mind the legal status of study participants because this status undoubtedly shapes their acculturation experiences and self-perceptions. By analyzing how immigration has affected sexual-minority males and thus shaped their learning needs, we aim for adult educators to become further aware of and engage with inclusive teaching practices. We chose to work with persons who possess Middle Eastern backgrounds because of the highly contested religious, political and cultural discourse that perceives homosexuality differently from Western nations. We hope that this paper will provoke a wider interest in examining not only the lives of sexual-minority male immigrants, but also the othered lives of persons who remain on the social periphery and yet have important learning needs to be met.

Learning to navigate a new culture and location is certainly part of the process of integrating within a new country. However, the lives of sexual-minority males are complex, especially in a current era whereby sexual-minority male immigrants (a) are unduly complicated by gay rights, (b) are situated within the numerous cultures to navigate through (e.g., political, ethnic, religious and so forth), and (c) must adhere the variety of laws in place especially those in committed relationships unrecognized in law. Once arrived in the new country, sexual-minority male immigrants may find themselves isolated and disillusioned by a social reality not meeting

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1The term sexual-minorities is defined as people who possess same-gender desires and act on these desires through their practices. The term represents a shift away from the practice of using Western-oriented, identity-generating categories, such as the terms gay men and lesbians, which may be unfamiliar in other cultural contexts.

2The distinction and categorization of developed and less developed are problematic terms for a variety of reasons beyond the scope of this paper. We suggest Abdi & Kapoor (2009) for a more meaningful inquiry into these two concepts within an adult education context.

3We remark here that “gay rights” continues to be a Western-oriented, socially constructed phenomena that may not have much relevance outside of Western contexts (Mizzi, 2008).

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their expectations. With this social reality in mind, the question that guides this inquiry is as follows: What are some of the learning needs Middle Eastern, male, sexual-minority immigrants possess in light of their unique positionalities as immigrants in Canada and the United States? This question reflects on how much of the literature around sexual-minority immigrants contains analyses about their difficult experiences crossing borders in particularly a United States context as well as cultural adjustment issues shaped by racist, homophobic and xenophobic encounters (Mizzi, 2012).

In this paper, we present three cases of male sexual-minority males who have come to the United States and Canada after having being born and raised elsewhere. Through the use of three separate case examples we examine how their lives, goals, and needs are very much constructed differently, despite sharing similar sexuality, gender, ethnic (Arab) and religious (Islam) origins. We begin this discussion with an explanation of the literary background and social context that characterizes the lives of sexual-minority immigrants. Afterwards, we explain our theoretical orientation (Transformative Learning) in which we view this work. We then describe our methodology, present our data and offer an analysis and discussion of the data. A conclusion then summarizes our key points in this paper.

**Background and Context**

Very little literature has paid attention to learning needs that are unique to sexual-minority immigrants. Activists and scholars have recently brought forward international awareness on the difficult lives of sexual-minorities as they cross borders (e.g., Luibhéid, 2004). For example, awareness, and in some cases, conflict, over gay rights in the US has brought heightened concern to sexual-minority communities. In the United States, a patchwork of marriage and domestic partnership laws cause confusion over the actual status of same-gender relationships. Although the uniformity of the same-sex marriage law in Canada has been helpful in this regard, the recently discovered *loophole* over the inability for foreign same-sex couples to divorce demonstrated once again that same-sex marriage remains a hot-button issue as sexual-minorities became alarmed that the confusion may lead to a complete reversal in law (Hayward, 2012). In both cases, laws remain politicized and, as a result, there is a distinct possibility that both positive and negative change could take place according to different regimes of power. Because of this uncertainty, anxiety over the present and future gains remains a concern for sexual-minorities.

Since we are referring to sexual-minorities, it is useful to point out that there is no uniformity when it comes to sociocultural perceptions of homosexuality across the globe (Herdt, 1997). The men participating in this study come from places that generally view homosexuality not in terms of an actual *identity* per se, but more so as a practice bound by gender roles amidst strict religious conventions. The introduction of sexual “identities” from Western nations has now complicated Islamic perspectives on sexuality. In some places, such as Egypt, engaging with Western sexual categories means that “there is a different level of awareness of wrongdoing when there is a term to describe what exactly is forbidden and consequently, the concealment is different” (Khayatt, 2003, p. 220). The “crime” then, as Dunne (1990) refers to it, occurs when individuals who practice same-sex acts *publicly* adopt a forbidden homosexual identity, or use the label of a gay identity to further shame or alienate one another. Homosexuality, or claiming a homosexual identity, forms a distinctive type of power relationship that is based on a dominant/subordinate = heterosexual/homosexual binary (Daniel, 1994).
Sexual categorizations of this kind mean that those persons who engage with cross-sex practices confer dominant power, and thus are considered normal. In contrast, persons who engage with same-sex practices become subversive within social relations. Dialmy (2010) contends that the rejection of homosexuality by Muslim men is heightened in the face of loss of power and prestige in their communities. Given that Muslims have largely been subordinated by Western society, the virulent rejection of homosexuality serves to strengthen masculinity and power in nationalist and religious milieu. The problem then lies with how this rejection of homosexuality has affected Muslim sexual-minority males, even in incidences when they immigrate to another country to “escape” harm. How this rejection shapes learning needs and practices is what we seek to further understand here. With this context in mind, we now turn to transformative learning theory to provide some insight into how to analyze this social phenomenon of crossing borders.

**Transformative Learning**

Transformative learning theory, a hallmark of adult education and adult learning, suggests that a particular type of learning occurs during a “disorienting dilemma” (Mezirow, 1978, p. 12). This means that deeply held beliefs and understandings about the physical and social dimensions are reshaped to reflect current experiences and dilemmas. Sometimes this experience can be disorienting to learners, which responsibilizes educators to effectively assist their learners through their dilemmas. Mezirow’s conception of transformative learning involves a step-wise process of critical thinking and transformation that affects the frame of reference (Dirkx, Mezirow, & Cranton, 2006). Mezirow’s steps (Dirkx et al., 2006, p. 124) involve:

1. Recognition that an alternative way of understanding may provide new insights into a problem;
2. Context awareness of the sources, nature, and consequences of an established belief;
3. Critical reflection of the established belief’s supporting epistemic assumptions;
4. Validating a new belief by an empirical test of the truth of its claims, when feasible, or by a broad-based, continuing, discursive assessment of its justification to arrive at a tentative best judgment;
5. Coping with anxiety over the consequences of taking action;
6. And taking reflection action on the validated belief.

With these points in mind, we observe that practical reasoning is the major tool that leads to perspective change as part of transformative learning. We also observe how Mezirow’s work has been characterized as being overly technical-rational and linear in nature, and does not reflect on the actual nature of perspective change (Baumgartner, 2012).

Dirkx, another significant transformative learning theorist, communicates that transformative learning is “inner work” or “soul work” (Dirkx et al., 2006, p. 125). Dirkx claims that transformative learning is more than a technical-rational process, and focuses on challenges
to “existing, taken-for-granted assumptions, notions, and meanings” (p. 126) as part of his reconceptualization. The result is a change in awareness of the inner self and a change in identity. The goal of transformative learning for Dirkx is the bringing together of the self and society such that “authenticity” can be achieved in thought and being. Dirkx contends that, and perhaps most an important aspect to our work, transformative learning re-shapes inner meanings and expectations through the changes brought on by learning and life experiences.

We understand transformative learning theory to be a useful tool in analyzing and understanding the cases of sexual-minority immigrants from the Middle East given the large cultural differences between the Islamic Arabic world and North America. Re-locating to a new culture as a sexual-minority provides enough dissonance for the technical-rational shift in perspective advocated by Mezirow's transformative learning approach and the inner change and identity work advocated by Dirkx. Transformative learning theory has been used to describe and understand a number of learning projects in which an individual moves from a more familiar context to one that is less familiar. It is through this transformative process that meaning making takes place, which makes learning both dynamic and responsive to individual needs. We argue that transformative learning as described by Mezirow and Dirkx becomes a useful tool for understanding meaning making by the study participants. For example, Eichler (2010) highlights the stories of heterosexual/straight-identified ally activists of LGBTQ people in a United States context who embody the inner change work advocated by Dirkx's perspective so that they can come to understand and appreciate sexual-difference.

Method

Case study methodology was chosen because its ability to “investigate complex social units consisting of multiple variables of potential importance in understanding the phenomenon” (Merriam, 2001, p. 41). Although case studies do not provide for more traditional generalizability to populations that studies of a quantitative nature provide, they do offer generalizability to theory as well as knowledge and practice development within the field (Anthony & Jack, 2009; Flyvbjerg, 2011).

We set out to develop an understanding of the phenomenon of sexual-minority males from the Middle East who immigrate to the United States and Canada and in doing so, decided on a multiple case study approach. According to Stake (2005), multiple case studies are of great use in investigating a “phenomenon, population, or general condition” (p. 445). The cases are not selected to represent the phenomenon as a whole, but rather to provide the potential for understanding the complexity of the phenomenon. The potential for learning about a particular phenomenon is a key criterion to the selection of the cases in a multiple case study. Each of the three individuals presented here as cases represents a unit of analysis. Our goal is not to produce an analysis suitable for generalization to the entire class of sexual-minority males in similar situations. Rather, we seek to unravel the complexity and demystify the process of crossing borders for sexual-minority males. We also selected our cases, which are at the individual level, with our own intrinsic interests in mind. As researchers, educators, activists, and social beings, we had a sense of the complexity that characterizes the lives of these men.

In this paper we present three case studies of sexual-minority males: (a) one Canadian, who is originally from Jordan, (b) one American, who is originally from Iraq and (c) a temporary worker from Saudi Arabia who is based in Canada and hopes of, as he says, “receiving a Canadian passport” in years to come. Each participant identifies as Muslim, but their
commitment to Islam varies according to the participant. We offer these three case examples because they share a regional Middle Eastern and Muslim background, and yet chose to re-locate to two different countries and diverse paths. In our view, this dual perspective informs some of the differences in learning needs. We present these cases in a case-by-case manner to preserve the complexity and wholeness of the stories of these men (Yin, 2012).

As researchers and educators, as well as men who identify as sexual-minorities, we have become involved in research around sexual-minorities through our own curiosity about reading the complications of the lives of sexual minorities. Robert, a Canadian, has extensive international experience working and living in several countries, including several Muslim-oriented nations, and focuses his research interests on sexual-minorities who cross borders. Matthew, an American, has worked with international students, and has numerous refugee, asylee, and immigrant friends and colleagues. Both authors are aware of the political and social implications of working as white, sexual-minority, North America-born men conducting research in intercultural settings and, as a result, approach our personal and professional interests with a great deal of sensitivity and care.

We chose in-depth interviews as the technique to facilitate data collection. Some researchers consider interviews with human subjects as being core to any qualitative fieldwork (Lichtman, 2010). Through the use of in-depth interviews, a researcher obtains greater insight into the human experiences that make up the social phenomenon being researched. In-depth interviews can be structured as an informal dialogue between the interviewer and the study participant (Lichtman, 2010). In-depth interviews, according to Lichtman (2010):

> Hear what the participant has to say in his own words, in his voice, with his language and narrative. In this way, participants can share what they know and have learned and can add a dimension to our understanding of the situation that questionnaire data or a highly-structured interview does not reveal. (p. 143)

Questions, then, act as a “flexible checklist or guide” that invites a greater emphasis on study participants’ voice in relation to interview topics (Lichtman, 2010).

Data collection and analysis occur simultaneously, both in and out of the field (Merriam, 2001). After in-depth interviews, the authors record their thoughts in memos and descriptive notes as well as short exchanges to one another through e-mail. Because the authors conducted the project together in disparate and separate locations, authors communicated and co-analyzed the data utilizing Web-based technology to exchange impressions, thought, and direction as they continued to refine their data collection. Each author provided the knowledge of one case and did the subsequent interviewing. All names and other identity-markers have been changed protect anonymity.

**Presenting the Data**

**Adnan’s Story**

Jordan, like other places in the Middle East, remains an uneasy and conflicted place to live for sexual-minority males. For Adnan, who was “itching for something different”, the promise of a more free nation that accepts homosexuality indeed inspired the possibility to live an open life without much complication around being a sexual-minority. Yet, arriving in
Toronto, Canada five months after 9/11 demonstrated that even free nations like Canada held deep racist perspectives toward people with Middle Eastern backgrounds.

Adnan reflectively questions, “How do I fit in North America? How do I accept my life being in North America with all of this around me, and what to do about it?” Committed to a better life for himself and for folks with similar backgrounds, Adnan began teaching adults, such as social service providers, about Islam and sexuality, Middle Eastern sociocultural backgrounds, and newcomer sexual-minority populations. Part of the job adjustment meant coming to understand, communicate, and blend Canadian and Arab perspectives on sexuality in certain work and life situations. For instance, participating in a pride parade was an experience that was “very overwhelming to say when you’re a gay Muslim or Arab, and have a flag and everybody is cheering for you and all this stuff with these straight people and families. I didn’t get it.”

It was moments like this one that began to complicate notions of sexuality for Adnan. Although he learned of pride parades taking place in the West while living in Amman, he didn’t expect to experience the barrage of emotions associated with the event. When reflecting on the gay and lesbian community in Toronto, he adds:

It took me a while to really realize that this is not who I am, that regardless of who I am attracted to, I don’t think I’m ‘gay’ which is Church Street⁴, which is Will & Grace⁵, which is Queer as Folk⁶. That’s not me at all. That is a very specific term in English to describe a certain culture – Western culture – and certain places of Western culture that doesn’t really speak to my history and my background, who I am, who I want to be and how I want to behave.

With this in mind, Adnan’s learning needs seem focused on negotiating a sense of self amidst a Western perspective of sexuality and how to blend these perspectives. He concludes:

So I think actually my views on sexuality might be a bit more controversial, especially, for example, when I worked on some projects around sexual health and HIV/AIDS when we’d talk about – like I would talk about gay men or MSM and men having sex with men, or we would talk about other identities that include people that come from different cultures and move around the world differently and have sexual encounters differently and all that stuff.

It is through this adult-teaching work that Adnan balances his cultural knowledge obtained from his Jordanian background and his present work/life situation in Toronto, and that this cultural work leads his learning journey.

Ali’s Story

Life for sexual-minority males in Iraq is rather complicated. On one hand, same-gender sexual activity is known to exist; yet on the other, it is not spoken about except in the most derogatory of terms. Further, extensive family and tribal systems keep sons and daughters living with their parents until marriage, preventing sexual-minority couples from cohabitating together. Same-

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⁴One of the “gay and lesbian” villages in Toronto, Canada.
⁵This is a popular American television series that depicts the lives of American gay men.
⁶Largely filmed in Toronto, this is a popular American television series that depicts the lives of American gay men.
negotiation. Sexual activity is frowned upon by all major religious, tribal, and racial groups in Iraq. Honour killings are practiced in some areas for those known to participate in out-of-marriage sexual activity.

When Ali was asked about coming to the United States, he states that he had the idea to come to the United States when he was in kindergarten, far before he realized his homosexuality. He states, “I didn’t come here because I’m gay” several times throughout the interviews. “Your story should be about someone who is unhappy about being gay and comes here. What you are writing is not good. I didn’t come here because I was gay,” he argues. Although it is his insistence that he did not come to the United States because he is a sexual-minority, he did seem to come for greater opportunity, which he later admits was at least a little about his sexual-minority status. At the time of writing, Ali had been in the United States for just over two years. Ali became interested in coming to the United States as a child when he saw footage of the United States Space Program, and envisioned himself as a future astronaut. “They [the United States] seemed to have everything. They seemed to have all the food, all the kids could travel to space.” Having grown up under the embargos in Iraq, Ali was used to having very little material or financial wealth.

Ali’s dream was to pursue a scientific or engineering career in the United States. He completed an engineering degree in Iraq as the Saddam Hussein’s Baathist regime was falling apart. After completing the degree, he became aware of the opportunity to work for the US Army as a translator. During his time working with the United States Army, he was heckled by the soldiers; recounting one time in particular where a number of soldiers pulled out their genitals and wanted him to perform oral sex on them. In order to avoid some of this harassment, Ali and another translator, a woman, developed a system, where she would claim to be his girlfriend, and he would find her customers for her illicit and growing prostitution business on the United States base. Ali smuggled items into the military base, particularly anabolic steroids, to a United States Soldier who promised he and Ali would be a couple in the United States. Ali took great delight in having found a husband, even though both men kept this secret. After Ali discontinued his service as a translator, which cut off the steroid supply, the soldier would not respond to calls from Ali.

After having arrived in the United States, Ali had a difficult time finding what he considered high-quality men for dating and friendship, relying mainly on online chat rooms and match-up websites. He had problems relating to the small Iraqi community in his city, especially because the other Iraqi men found his sexual orientation unacceptable. He was left trying to bridge two social groups related to his identity as an Iraqi sexual-minority male. Few American men seemed to want to be friends or date because of his seemingly strange accent, culture, and their own xenophobic values towards outsiders. He had a few part-time jobs, but was eventually laid off over time. Ali is largely disillusioned by his experience in the United States, both in terms of meeting potential partners and in terms of his meeting his professional goals. He states,

I had a fake dream. It’s not the ‘Promised Land’ I dreamed of. Like, no jobs, with all my skills. My degree is nothing. … I’m always under the spotlight for being Arabic, and I’m always suspect for being a terrorist. Plus my last name is [a common Arabic name] and that makes things harder.

Ali does have a boyfriend he has lived with for almost two years. Although he was prepared to be a professional engineer in Iraq, in the United States he has had to take up studying
a second bachelor’s degree because his Iraqi degree is not acknowledged among the engineering field in the United States. He continues to grapple with the notion that “homosexuals are at the bottom” in Iraqi society and relates his unmet expectations and limited success in the United States to this belief.

Murad’s Story

By the age of 14, Murad had already secretly developed sexual relations with other men, enjoyed American, queer, pop culture, and involved himself in the underground sexual-minority scene in Riyadh, Saudi Arabia. He explains:

From my age of 16-18, we were safe. Nobody knew what gay meant. We had our cafés, and our parties and it was fine. After I left in 2006, society for many different reasons including a vocalization of being queer from the West, the government started to react and acknowledge that we exist. That wasn’t a good thing because since then I’ve witnessed every gay Saudi friend get arrested.

Given that Saudi Arabia considers homosexuality a crime, Murad, who enjoys disturbing male gender roles through, for example, wearing make-up, needed to live in a city where it is safe for differently gendered individuals. In his view, living in such a city is important if he is going to maintain a trajectory of personal and professional success.

At age 18, Murad never expected to head to Canada for school or work. Members of his family already had a long tradition of visiting and studying in the United States, and then returning back to Saudi Arabia after their degrees were completed. After receiving a suggestion from his father to study in Canada and not the United States due to the post-9/11 backlash against Muslims and cutbacks in the government scholarship schemes to the United States, Murad first looked online for information. His first act was not to examine the visa requirements for Saudi nationals to study in Canada, probe how Islam-friendly Canada was, or what kind of schools were available to him. Instead, Murad looked up what sexual-minority life was like in Canada, and specifically chose Toronto for its characterization as, in his words, a “gay heaven” and because Toronto was the setting for *Queer as Folk*, which he used to watch with his friends while living in Riyadh. But safety against sexual persecution was not the only impetus for Murad’s transition to Canada. Murad also required a space that was friendly to Middle Eastern people in a post-9/11 world. When he began school at a Canadian university in Toronto, he began to learn about Canada’s multicultural identity and how racial minorities come to terms with living in a “plural” society. Although he observed how every nation in the world seems to be represented in Toronto, he shares:

It is very racist here, but not as bad as the southern states in the United States or Australia. There is that facade of everyone living together and at the end of the day I’ve had so many friends, including myself, trying to find jobs who struggle because of their associations. I have friends who change their name to a ‘white’ name, and then they finally would get callbacks. I have had to learn how to adapt as well.

In addition to this point, when asked about what would have helped him adjust to Canada, he comments how he realized beforehand that Canada was “gay-friendly”, but he too felt the
overwhelming nature of pride. “It was exhausting mentally, but it was fantastic,” he shares. Yet, reflecting on the diversity within pride, he comments how he did not fully realize the amount of racism and sexism within Canadian, sexual-minority culture. He describes that he has “lost faith now in the movement” because Canadian sexual-minority groups have not come to the realization that sexuality and masculinity is understood differently in other cultures. Continuing to use Queer as Folk as his acculturation guide, he has re-viewed the television series since relocating to Toronto and now noted the “problematic” nature of the program and the social “familiarities” of the setting. Murad explains: “In the gay community, masculinity is seen as most valuable and attractive, which I find myself sexually subscribing to. I find this problematic and I need to check myself.”

Last, Murad comments how he learned of the social services in Canada when his Somalian friend was kicked out of his house for being gay. He explains:

I was with him throughout the process. It was right after I got here and it was fascinating to see all the resources and community organizations and everything. He did not know what to do. I was thinking that if this happens in Saudi, no one is going to give a shit. But I noticed how there are gay community centres here and there are gay rights and no one is prepared to do anything for this kid. That was a wake-up call: the ‘gay heaven’ is not ready for kids who get kicked out of their homes but, oddly enough, it is ready to organize weddings.

For Murad, it becomes a matter of balancing expectations when crossing borders and not to assume that a “gay community” is very affirming or accepting of social difference.

**Analysis and Discussion**

In our view, the concept of learning needs stem from a need for development. The goal of identifying learning needs is to improve upon skills and knowledge that meets a specific purpose. Immigrant sexual-minority males learn the kinds of new knowledge that are necessary to assist immigrants with acculturation and adjustment to a new work-life situation. In this work we have observed that although homosexuality and the Middle East have an uneasy relationship, there is a definite articulation of same-sex desire in the region that is incongruent with Western values around sexuality-difference. This data presented in this paper points out how this tension creates specific learning needs for male sexual-minority immigrants from the Middle East. More specifically, the cases presented in this paper suggest a negotiator imperative, which observes and interprets phenomena through cultural lenses most familiar to the study participant, and, significantly, learn of ways to negotiate through strange and unusual encounters, such as pride parades. This imperative calls upon each participant to work through their foreign experiences on their own and without guidance or facilitation. We frame the analysis of these cases around three time stages of their experiences, (a) Experiences in Home Countries, (b) Initial Experiences in North America, and (c) Transformation.
Experiences in Home Countries

All three men were seeking something different in their quest to immigrate to Canada or the US. More specifically, Adnan sought a freer place that openly accepts homosexuality, Ali sought greater opportunity for career and personal advancement, and Murad chose Canada (Toronto in particular) because of the sexual-minority and Muslim-friendly metropolitan life offered. As outsiders looking in from the Middle East, North America painted a falsely rosy picture through discourses such as pop culture or human rights campaigns.

Initial Experiences in North America

Once landed, however, each of the three participants struggled with how their sexual-minority, Arab, Muslim identity fits into North American society. Racialized experiences such as these ones are not new in the literature. Jasbir Puar (2007), who writes on the topic of homonationalism, reflects on how members of the sexual-minority, Sikh community became targets for violence after 9/11. Puar further writes:

It certainly appeared to be the case that our queer South Asian communities were doubly vulnerable to these attacks, especially those more conspicuously marked by visible traits associated with gender nonnormativity, working-class and working-poor backgrounds, and immigrant bodies and speech. Some of those assaulted encountered very specific references to faggotry or other homophobic slurs. (p. 168-9)

On one hand, for some sexual-minority men, such as those referenced in Puar’s work, integration becomes a test for survival. Yet, on the other hand, some sexual-minority men, such as Adnan, Ali, and Murad, these tests begin to carve out a specific set of learning needs. For instance, although Adnan felt overwhelmed with a predominantly white, middle-class, gay community, he addressed his learning needs through teaching about Islam to and engaging dialogue with Canadian social service providers. In addition, Ali’s experience speaks more so to his personal and professional need to work in his preferred field. Murad’s experience provides another perspective, whereby there are social and educational circumstances that inform his learning needs of how to navigate through Toronto as a sexual-minority male, an immigrant, and a Muslim.

Transformation

Although personal differences (e.g., personality, background) certainly shape life directions, perhaps these three situations illustrate the importance of context and its role in reconstructing learning and identity in the new work/life situation. What we mean here is that since Canada, and more specifically, Toronto, has indeed sexual-minority-affirming aspects of sociality, Adnan learned of the possibilities to pursue a work/life path largely unavailable in Jordan and Murad learned of the limitations towards a successful acculturation. In contrast, Ali came to the United States expecting new possibilities of a similar nature, which were largely unmet. He is unable to practice his profession, thus learning the impossibilities in the transition. Although each participant was promised acceptance into their choices, they each felt they were sold false hope. Their learning needs surfaced by understanding what was (not) presented in the
new work/life scenario, balancing the possibilities, limitations and impossibilities, and coming to grips with social differences before, during and after immigration.

Given the “controversial” nature of homosexuality, this balancing of possibilities, limitations, and impossibilities in the new country further complicates matters for these sexual-minority males and reveals multiple, diverse, and conflicting learning needs. For example, Ali’s experience with the soldiers while in Iraq sheds light on the ongoing struggles he has within the United States. The soldiers wanting oral sex from Ali can be interpreted as both an individual desire as well as more symbolically as treating Ali as the submissive, domestic, and feminine role in post-war Iraq against their own hyper-masculine, powerful, and wealthy United States. Ali’s experience in the United States continues this theme whereby he struggles to find validation and fair treatment through employment, particularly one that utilizes his talents and training in the science and engineering field. Ali’s learning needs are complex because his needs are characterized by re-living his past experiences, negotiating through present life circumstances, and carving out a future path for professional success. He realizes the possibilities, limitations, and impossibilities that shape his learning needs.

Ali’s story is not alone in the data. Adnan and Murad also balanced possibilities, limitations, and impossibilities as they navigated through life in Canada. Life in Toronto was not a “gay heaven” for ethnic, sexual-minority males and the Canadian study participants needed to re-orientate their learning through their day-to-day life experiences. For example, when Murad learned of what is (not) provided by social service providers in the case of his friend being kicked out of his house, he began to doubt the capability and openness of Canadian agencies to support sexual-minorities. He reflected on this inability as being similar to life for sexual-minorities in Saudi Arabia.

In light of the information presented in this study, it becomes clearer to us that the process of identifying learning needs can be just as important as meeting learning needs. Study participants learned from multiple sources and sometimes these sources were inconsistent with social realities and with each other. This inconsistency caused a heightened “disorienting dilemma” during the transformative learning experience that is characterized by an increased sense of confusion, disdain, and betrayal. What ultimately provided some solace for these participants was the development of helpful relationships with individuals from both Western and Middle Eastern backgrounds. These relationships assisted study participants in negotiating difficult encounters and maintaining a trajectory of development.

**Conclusion**

This paper introduces some of the difficulties associated with being a sexual-minority male and the act of crossing borders. Through the experiences of three Middle Eastern and Muslim men who immigrated to Canada and the United States, information about learning needs came to light. The three cases provide insight on the way that being sexual-minorities intersect and, at times, trouble heterosexist perceptions of an immigrant identity. These three cases provide three different experiences that reveal possibilities for sexual-minority men immigrating to the United States and Canada. Learning of and contextualizing these experiences provided some clue into how the experiences of immigrants negotiate the context of Canadian and American lives. We understand that the lives and experiences of these men will continue to be enriched by their ongoing learning and identity work. What is clear in the data is that individuals immigrate for a variety of reasons, and in many ways, are left to explore and make sense of their new lives on
their own. These men live between borders in terms of negotiating the identities associated with
being immigrant, the identities that originate from their home cultures, and the requisite
identities constructed in American and Canadian life. These lives are especially complex for
sexual-minority males because they navigate and explore homosexuality in a location where life
is very different in their new context than their former locations. Even though they immigrated
for the chance to develop new possibilities, the social reality of immigrant life as a sexual-
minority man from the Middle East is rather complex and certainly not easy. Their learning
journeys are transformative; they face multiple disorienting dilemmas and have to resolve these
dilemmas through acquiring new understandings. Through shedding light on the complexity of
the life experiences of these men, we hope to show there are unique learning needs to be
considered in the planning of educational and social programs.

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As a visible minority educator, I am always interested in analyzing the personal tensions, environmental barriers, and imaginative possibilities that exist when embracing equity- and diversity-conscious approaches to teaching, learning, and interacting in higher education institutions. In Whose University Is It, Anyway? Power and Privilege on Gendered Terrain, these areas of tension are treated as creative spaces to draw from the work of feminists who use this site as a site for power and new knowledge production. Whose University Is It, Anyway? Power and Privilege on Gendered Terrain motivates the reader to question whether equity is available to all individuals whose identity is interwoven with gender, race, ethnicity, disability, social class, and religion and within various situational subjects (e.g., student, teaching assistants, faculty, and administrators) in a Canadian context. The book has four parts; the first section illustrates the challenges facing racialized minority women, Aboriginal women, and women with disabilities. The second section explores various experiences such as those related to racialized minority scholars, and women who have experienced violence, queer and gendered individuals. The third section provides narratives of women in various academic roles (teaching assistants, administrative assistants, department chairs, and non-tenure-track faculty). The diversity of the women’s experiences enriched the book by allowing the authors to explore various gender-related aspects. In the fourth section, the authors provide strategies and opportunities through personal experiences, and express hope that their contributions will improve the current situation in higher education.

Collectively, throughout the fourteen chapters, the authors tackle issues of power, equity, and marginalization of women in a Canadian higher educational institution. The introduction of the book is unique in terms of the authors’ use of “three dimensional matrix” to theorize issues related to power, privilege, equity, and marginalization; (a) the different perspectives of diversely situational subjects in order to examine the “dynamics of power and privilege of the ivory tower”; (b) the intersectionality that covers various identity category with the primary focus on gender (though some chapters did not); and (c) the use of narrative approach as well empirical qualitative studies. Within this three dimensional matrix, the issues examined in this
book are not solely related to a Canadian context, but extend to most institutional settings. However, the institution’s setting is in the diverse city of Toronto, where the women’s shared experiences differ completely from monocultural settings when examining the intersectionality of racialized females. This can be seen clearly through White’s experiences as being the only racialized female in courses whose student populations are more culturally homogenous. She observes that having racialized faculty as role models will not resolve the status quo of inequity in higher education. Instead she calls for “holistic expression of other” and the need to study in further detail how the dominant culture controls pedagogy and curricula.

Intersectionality plays an important role in revealing the multiple factors that shape minority women’s experiences of marginalization in terms of viewing gender through a prism of racist and patriarchal discrimination. Many visible minority feminists (Crenshaw, 1989; hooks, 2000a, 2000b; Miles, Rezai-Rushti, & Rundle, 2001; Mohanty, 1991) have argued that the issues facing women of colour were not part of privileged White feminists’ agenda, as the latter focused primarily on “gender discrimination” and “gender oppression” through their own particular experiences. In Whose University Is It, Anyway? Power and Privilege on Gendered Terrain, each of the authors used intersectionality differently. Gender was the primary topic of discussion in most of the chapters. Moreover, in some chapters that examine the academic role with gender, other identity categories were not thoroughly considered. With this respect, it is important to consider the author’s identity when examining the use of intersectionality and its adherence to women’s experiences. For instance, Michelle Webber’s chapter examined how teaching assistants navigate the concept of feminism in their seminars. All the teaching assistants were White and the focus was on the gender over other identity categories. It would have been helpful to include the voices of minority teaching assistants and provide more opportunities for examining the dimensional matrix of intersectionality from the perspective of Teaching assistants as the intersectionality of race, ethnicity, religion, social class, and other category reveal the various marginalization faced by women in academy. This is also clear with Sandra Acker’s words describing her experiences as a department chair, “I cannot know what I have made of administration had I been from different cultural group” (p. 181). As such, it would have been helpful if the authors explain explicitly the impact of intersectionality on the experiences of minority women versus White women in academy.

Many of the chapters address how certain sources of knowledge are marginalized, like the experiences of Cyndy Baskin, who expressed how mainstream social work curriculum ignores the voices of Aboriginal peoples. Kimine Mayuzumi and Riyadh Shahjahan also share through their participants’ experiences how “spiritually minded racially minoritized women faculty” experience challenges when attempting to balance their religious or spiritual identity with the dominant secular Western values. They go on to express their feelings that their spiritual interests were not acknowledged within academia. Although their spiritual knowledge was subjugated, the participants continue to gain their confidence and strength from their beliefs and insist on providing positive images against stereotypes such as the Muslim females wearing the hijab in the academy. Another participant, a visible minority African female professor in Mayuzumi’s and Shahjahan’s study, who expressed how many academics underestimate the importance of one’s personal religious beliefs, related how she found herself hiding her Christian values, though she explains her Christian values differ from ‘White Christian’ values. As such, this book is a vital reminder for those interested in equity and social justice to critically consider that regardless of all the policies of excellence, diversity, and equity – especially those discourses

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examined by Maria Athena Martimianakis in the first part of the book – many individuals still struggle to preserve their identity in higher education. Thus, this book calls for the need to continuously revise those policies related to equity in academic institutions. Most importantly, this book, via the voices of various women’s experiences that were examined through intersectionality, encourages readers to challenge the policies of equity and count on individuals as agents of transformation and change.

Finally, *Whose University Is It, Anyway? Power and Privilege on Gendered Terrain* provides insights into the equity issues in Canadian universities. Specifically, issues addressed in this book that relate to equity may be extended to other institutions in this globalized and interconnected world, in which many individuals struggle to navigate their identities within the policy framework of the institutions that are influenced by the structure of global corporations. This book, through its relation of the complex experiences of women, is timely and helps those interested in equity to continuously think of *Whose University Is It, Anyway?*

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