Dismantling Universals: Literacy within the Context of Globalization

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A Thesis

in

The Department

of

Education

Presented in Partial Fulfilment of the Requirements
for the Degree of Master of Arts (Educational Studies) at
Concordia University
Montreal, Quebec, Canada

September 2008

ABSTRACT

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The focus of this thesis is literacy but it is also about the veiled urgencies of becoming

literate. Fueled by the restructuring of the labour market and profound structural changes

in the economy, a social narrative developed warning nations that they were unprepared

to meet and possibly benefit from the challenges of globalization. As the neo-liberal goals

of accountability and of performativity have begun to reframe both education and

literacy, it has become ideologically strategic for governments to quantify and measure

literacy. Instruments, such as the Adult Literacy and Life Skills Survey (ALLS), have

been created in alliance with the OECD, to address the fears that the purported downward

spiral of falling standards of education and literacy will result in both the inability to

competitively survive within the global marketplace and of being overtaken economically

by other countries. This thesis argues that within this global economic framework, a

revised hegemonic form of functional literacy has become the latest unquestioned

benchmark required by the knowledge workers of *new capitalism*. Questions asked by the

alternate approach of New Literacy Studies (NLS), such as, "whose literacy?", "at what

cost?", "for what purpose?" and "in what context?", are not considered by this hegemonic

form. A significant way that market ideology is naturalized is through commodified and

de-historicized language. This thesis applies aspects of Gee and Fairclough's approaches

to Critical Discourse Analysis to explore the language of the ALLS in an attempt to

question the consensual perception of both literacy and globalization.

Acknowledgements

It has been said that academic work goes side by side with the work of life, and that life is lived with many others. My experience proved differently, as life, more often than not, won out leaving academics *waiting to exhale*. Of those who encouraged me to keep breathing, I am forever indebted.

To my advisor and professor, Dr. Ailie Cleghorn, I am particularly grateful for her unfailing encouragement, patience, and gentle eloquence. Without her wisdom and understanding about "the stuff of life", this thesis may never have been completed.

For my husband and best friend, Mark, I am forever grateful for his unwavering belief in me and for reminding me that life is a *Suicide Squeeze*, you have to run all out at the pitch without knowing if the batter will hit the ball.

For my son, Forest, a fearless writer, who screeched into adolescence during the gestation of this thesis, I thank him for reminding me that there is always another way of perceiving and interpreting reality.

Many friends bestowed their well wishes for a speedy completion but Paula Vieira and Ainav Derkson, having already jumped through the ring of fire, understood the process all too well. Their patience, tactful listening skills and suggestions were very much appreciated.

If it takes a village to raise a child, it most certainly has taken a lifetime of teachers to help inspire this thesis. The spirit of so many accompanied me throughout the process. In particular, I am fortunate to have crossed paths with Ron Burnett, Mary Mar and Ailie Cleghorn. I was introduced to the ideas and practices of democratic education through Ron Burnett and I was first acquainted with the idea of multiple literacies through Mary Mar and her Writing Centre at Concordia University. These early beginnings converged in Ailie Cleghorn's graduate *Cross-Cultural Approaches to Literacy* course resulting in this thesis.

I am also grateful to Professor Hamalian and Professor Naseem, the members of my Examining Committee, who provided me with their thoughtful and critical insights.

Dedication

This thesis is dedicated to the memory of my mother, Maria Virginia Olivieri, one of many siblings, first generation working class Italian Canadian, whose educational sojourn ended abruptly in early elementary school so that she could support her family. Her lifelong feeling that she was outside of most secondary discourses was the fertile ground where the seeds of my political sensibilities were first germinated.

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Chapter 1

Introduction

Dismantling Universals: Literacy in the Context of Globalization

> The meaning of 'literacy' as an object of inquiry
> and of action – whether for research purposes or
> in practical programs – is highly contested and
> we cannot understand the term and its uses unless
> we penetrate these contested spaces.
>
> B.V. Street, Understanding and Defining Literacy (p. 76)

> It must be said that enthusiasm for the idea of globalization
> has not been matched by clarity in the way the term has
> been applied. 'What does globalization mean?' asked
> *The Economist* in its 1992 'Survey of the World Economy'.
> The term, it went on to assure the reader, 'can happily
> accommodate all manner of things'...
>
> L. Weiss, The Myth of the Powerless State (p.168)

On January 18, 2002, a resolution heralding the global imperative of literacy was adopted by the United Nations General Assembly who reserved the subsequent ten-year period, 2003-2012, as the United Nations Literacy Decade. Coordinated by the United Nations Educational Scientific and Cultural Organization (UNESCO), its mandate is education and literacy for all. In an attempt to sanction the importance of this event, a series of professionals affiliated with UNESCO were featured on the Organization's web site.

For Dr. H.S. Bhola, an education professor at the University of Indiana and formerly of the Experimental World Literacy Programme in Tanzania, after the ability to

speak, "reading and writing are the second culmination of our humanity. By failing to provide literacy, we deprive people of being fully human". For Claude Harvey, Director of UNESCO's Namibia office in Cluster Windhoek, literacy is "… a moral issue. Can we justify excluding 877 million from participating in the modern world just because they are rural and difficult to reach? ". Adame Ouane of UNESCO's Institute for Education in Hamburg unequivocally states, "Literacy is important because it is the key to the toolbox that contains empowerment, a better livelihood, smaller and healthier families, and participation in democratic life" (UNESCO, 2002).

The UNESCO website continues to unravel the "problem". We are informed that the global Diaspora of illiteracy has increased to 877 million adults and 113 million children, that developed as well as developing nations are both affected, that women in particular are the hardest hit, and that each passing year, the problem intensifies. Literacy within this context is defined as more than the ability to read and to write and to do arithmetic, with "more" referring to the skills necessary to function autonomously and effectively within *the new global context*.

As well-intentioned and convincing as UNESCO's goals are, literacy is portrayed as a universal concept and as such, is not problematized, that is, it is not seen as a *contested space* (Street, unpublished, p. 76). Questions such as, "whose literacy", "at what cost", "for what purpose", and "why and how does one measure literacy" are not readily evoked by UNESCO's definition. As such, this brand of literacy leaves itself open to being commodified as a hollow 'motherhood statement', the meaning of which remains unquestioned and automatically accepted as a neo-liberal benchmark for literacy within the context of "globalization".

Literacy within this framework is "traditionally defined as the ability to read and write in page-bound, official standard forms and *more often than not*, in the official language" (Cazden, Cope & Fairlough et al., 1996). The problem with this model is that it positions literacy as a universal and neutral construct that obscures the cultural and ideological assumptions that are behind it, as well as the complexity of the problems literacy purports to alleviate. As Street (unpublished) argues, "understanding and defining literacy lies at the heart of 'doing literacy' ". Without this understanding, there can be no control over the effects of policies and practice"(p. 83).

The focus of this thesis then is to problematize the traditional notion of literacy. Throughout history, literacy, as Graff (1987) explains, has been used to inculcate the values and views of those in power. More recently, the practice of measuring literacy or rather *illiteracy* through the use of the survey has become a significant departure from earlier attempts to define literacy. With surveys such as the International Adult Literacy Survey (AILS) and the Adult Literacy and Life Skills Survey (ALLS) measurement is becoming institutionalized on an approaching worldwide scale to meet the global demands of the New Work Order (Gee, Hull & Lankshear, 1996).

Statistics Canada's 2003 report on the results of the International Adult Literacy and Skills Survey entitled *Building Our Competencies* claims that

in a global economy, a highly skilled population is an asset and fundamental to economic growth. Factors such as globalization, the impact of new technologies and the move to a knowledge economy have led the occupational composition...to shift more towards highly skilled

occupations requiring higher levels of education. A knowledge economy

requires workers who can adapt quickly to the changing skills

requirements in the labour market. The social implications of literacy,

numeracy and problem solving are no less important. (p. 11)

As the work imperative associated with "globalization" claims to be overt about

the vision needed to support the *new world order,* the line between schooling and work

becomes obscured. The purpose of education from this perspective is to prepare the

workers of the future for the workforce and to serve the marketplace. The brand of

literacy being offered is tailored to that end. Gee, Hull and Lankshear (1996) ask, "how

should we construe learning and knowledge ...in a world where the new capitalism

progressively seeks to define what counts as learning and knowledge in a *knowledge

economy* made up of *knowledge workers* doing *knowledge work*? " (p. 23).

Gounari (2006) proposes that a significant way that market ideology is naturalized

is through "commodified and de-historicized language where terms such as knowledge,

skills, access, freedom, choices and opportunities...are aligned with the logic of the

market" (p.78). Moreover, as the language of this new global work order usurps

discourses associated with social institutions such as communities, churches and

education, it becomes more and more imperialistic. Consequently, the ability to develop a

critical social perspective runs the risk of being siphoned and commodified into perceived

critical thinking skills for the workforce. If this is the case, we are indeed entering into a

"crisis of critique".

This thesis will argue that literacy surveys such as the AILS and ALLS frame literacy within a rigid skills paradigm that obscures the underlying ideological thrust of the market. To interrogate the silent meaning within, this thesis will view the Adult Literacy and Life Skills Survey as artifact to be analyzed by excavating sets of codes or interpretive norms embedded within its text. As Heath (1983) maintains, insights extracted from this type of exercise may lead to important perspectives on approaches and attitudes towards literacy.

Before this task can be undertaken, the context for this endeavour, that of globalization, will be investigated in Chapter 2. This is no simple journey, for as Weiss (1998) explains the meaning of globalization "can happily accommodate all manner of things" (p.168). More often than not, globalization is depicted as a means of describing worldwide economic trends and as a metaphor for a borderless world that promises opportunity for growth and prosperity. As a force, it is presented as "irresistible, inevitable and inescapable" (Veltmeyer, 2004). However, there seems to be much confusion between what actually defines this "epoch defining shift" and the levels of discourse embedded in this concept. Hence, not unlike the concept of literacy, this thesis argues that globalization is better viewed as a political project, "a desired outcome that reflects the interplay of specific socio-economic interests" (Petras & Veltmeyer, 2004).

Once the context for this thesis has been unraveled, the subsequent chapter, Chapter 3, will focus on the central topic of this thesis, literacy. Just as colonial powers were able to convince themselves that colonial replications of the mother countries were the best path to "civilization" for their colonies, so too has the neo-liberal representation of literacy become an ideological emissary of "globalization". Not unlike globalization,

literacy has become a spurious term, the meaning of which has gone unquestioned.

Chapter 3 will briefly explore literacy from a historical perspective. Concepts such as "functional literacy" will be analyzed critically through the lens of New Literacy Studies, an ethnographic perspective that problematizes literacy. This model chooses to re-frame functional literacy as the autonomous model of literacy. Measuring literacy is a relatively recent practice promoted as a means to meet the perceived demands of "globalization". This chapter will introduce the idea of the literacy survey and discuss the Adult Literacy and Life Skills Survey (ALLS) in particular. This will be followed by an analysis of the Organization for Economic Co-operation and Development (OECD) as the ALLS study was spearheaded by the OECD in association with Canadian and American national statistical agencies.

Though this survey has been employed as an instrument to measure adult literacy and numeracy primarily in developed countries, it is important to remember that the long term objectives of the ALLS is " to foster continued international co-operation ... to identify sub-populations whose performances places them at risk and to contribute to the literature on the basis of human cognition" (Statistics Canada, 2005 p.17-18). The significance of these objectives will become more multi-dimensional in Chapter 3 where the fabric and mission of the OECD will be discussed.

Chapter 4 will introduce discourse analysis, the research tool that will be used to analyze select items from the ALLS. While there are many forms of discourse analysis, the approach for analyzing/dismantling the items of the Adult Literacy and Life Skills Survey (ALLS) in Chapter 5 is inspired by Gee's (1992, 1999) approach to discourse/Discourse (big D/ little d) analysis as well as Fairclough's approach of Critical

Discourse Analysis (CDA) (1989, 1992, 1995).

Chapter 5 will apply aspects of critical discourse analysis to study several of the items from the Adult Literacy and Life Skills Survey. One of the goals of this exercise is to challenge the implicit unapologetic hegemonic claim of the ALL survey, that the autonomous model of literacy is a universal experience that circumvents class, ethnicity, culture and gender. As discourse analysis is contextual, the analysis of sample questions of the Adult Literacy and Life Skill Survey will be searching for linguistic as well as cultural meaning. This will be attempted by analyzing both the language of the sample questions and by exploring the cultural as well as political assumptions that these questions hold.

Chapter 6 will conclude by revisiting the central argument of this thesis and by suggesting topics for future research.

Relevance of Topic

Macro-perspective

Just as there is mounting pressure for global education and "literacy for all", so too is there the possible threat that education will be treated as a commodity. In an unprecedented historical move, the now defunct General Agreement on Trade and Services (GATS) attempted to include education as part of its economic bargaining platform. The implications of commodifying education in this way could have resulted in privileged powers selling, and developing countries buying educational packages,

textbooks, technology and supplies giving rise to a loss of cultural diversity, indigenous language and values.

Within the GATS, contractual elements, such as the *Most Favoured Nation Clause,* ensured that participating members of the trade agreement would have equal claim, resulting in no distinction being made between foreign or domestic products. Should education be included in any similar future GATS-like trade agreement, then local governments would not be allowed to favour domestic educational programmes or schools over external competition. Consequently, objections to foreign "intervention" would be considered protectionism and as such, in violation of the global agreement (deSiquera, 2005; Robertson, 2003).

The GATS may have been put to rest. However, it is likely that new, perhaps more cloaked, attempts to enlarge the imperialist reach of the market will include domains such as education, previously thought of as protected and separate from corporatism.

Micro-perspective

The focus of this thesis is literacy but it is also about the veiled urgencies of becoming literate. By critically looking at the some of the questions presented in the Adult Literacy and Life Skills Survey, by questioning the matter-of-factness of its stance, and by looking at the role of the OECD as brand steward for this newly packaged product of literacy, this thesis is attempting to question the consensual perception of both literacy and globalization.

If what Gounari (1996) argues is correct, that we are witnessing a "crisis of critique" resulting in the suffocation of questioning then perhaps what is needed is a literacy that is about intervention and not about "competence" (Bahbah, 1999). This thesis is a modest attempt to do just that.

Chapter 2

Globalization

DEFINITION OF GLOBALIZATION

QUESTION: What is the definition of Globalization?

ANSWER: Princess Diana's death.

QUESTION: How come?

ANSWER: An English princess with an Egyptian boyfriend crashes in a French tunnel, driving a German car with a Dutch engine, driven by a Belgian who was drunk on Scottish whiskey, followed closely by Italian paparazzi, on Japanese motorcycles, treated by an American doctor, using Brazilian medicines!

And this was sent to you by an American, using Bill Gates' technology which he enjoyed stealing from the Japanese. And you are probably reading this on one of the IBM clones that use Taiwanese-made chips, and Korean-made monitors, assembled by Bangladeshi workers in a Singapore plant, transported by lorries driven by Indians, hijacked by Indonesians, uploaded by Sicilian longshoremen, trucked by Mexican illegal aliens and finally sold to you. That, my friend is Globalization! Finally, an explanation in English...

Globalization Joke: www.ebaumsworld.com/defineglobal.shtml

Like *Literacy*, the term "Globalization" has been attributed a monolithic status, the meaning of which, in most instances, is neither clearly defined nor questioned. A generic description of the term offered by Petras and Veltmeyer (2004) define globalization as the process of integrating the economies and cultures of societies into a worldwide system. However, since the term has become part of everyday discourse intersecting the domains of academia, policymaking and popular culture, a myriad of interpretations have evolved.

Held (1991) attempts to define globalization as, "the intensification of world wide social relations which link distant localities in such a way that local happenings are

shaped by events occurring many miles away and vice versa" (p 9). Globalization has also been defined as the fragmentation and reintegration of economies that is made possible by the simultaneous advances of computer and telecommunication (Wilms, 1996) and as the *McDonaldization* or as the *Americanization* of culture implying the demise of the nation state (Ritzer, 2004; Strange, 1995). It has been ascribed descriptors such as time, space, flux and flow and has been sanctioned by the popular culture of cyber space.

Globalization has been glorified as the architect of the "borderless" world (Ohmae, 1990), resulting in the end of the nation state and the beginning of international free trade. From the perspective of the World Bank and the World Trade Organization, it has been equated with modernity, progress and the relief of poverty. From this "united we stand" perspective, globalization has been marketed as being all things to all people, a true Dartanian-like populist phenomenon. The reality, however, is that divided only a select few benefit.

Nowhere in these sanitized attempts to describe and explain this illusive concept of globalization is there an acknowledgement that at most 25 percent of what Wall Street calls the 'emerging markets', participate and profit in the *new consumption standard* spawned by globalization (Fitzsimons, 2002) or that the total monetary worth of the world's top 225 wealthiest people is equivalent to the combined annual income of the world's poorest 2.5 billion people (Wolff, 1995, p 7). Currently, approximately 5 billion people worldwide subsist on $2 a day while the 200 largest transnational corporations (TNCs) control 28 percent of the world's economy and employ 0.25 percent of the global workforce (McLaren & Farahmandpur, 2005).

When Gross Domestic Product (GDP) and revenue of corporations are compared with that of countries, the following occurs (Uni Commerce, 2002 cited in Leigh, 2004): ExxonMobil ranks 45th, comparable in economic scale to Chile or Pakistan; Wal-Mart is placed higher than Cuba, Uruguay, Tunisia, Luxemburg, Slovakia and Croatia combined; DaimlerChrysler or General Electric is approximately at the same level as Nigeria; Philip Morris is on par with Tunisia, Slovakia or Guatemala. Moreover, 80% of Fortune's top 100 TNCs are based in the United States or Western Europe and have increased their control of the world's economy (Petras and Veltmeyer, 1999).

More often than not, globalization is presented as a means of explaining and describing the economic process of worldwide trends as being "irresistible, inevitable and inescapable" (Veltmeyer, 2004 p.1). It also offers an embedded prescription that the liberalization of national and global markets will result in unequivocal economic growth and prosperity for all who embrace this path.

This thesis takes the opposing position that the very pervasiveness of the concept of globalization is problematic. Not only does it represent a fundamental paradigm that frames much of the substantial literature in the field but many of the attempts to interpret globalization do not make a distinction between the purported "epoch defining shift" and discourses of globalization. Consequently, globalization also suggests an underlying ideology that obscures reality. Hence, not unlike the concept of literacy, globalization is better viewed as a political project, "a desired outcome that reflects the interplay of specific socio-economic interests" (Petras & Veltmeyer, 2004 p.11).

It follows that globalization may not be the most useful framework to understand and explain the major dynamics of change in the world. Rather, this thesis supports the

views held by Petras and Veltmeyer (2004, 2001) and others (Chomsky, 2004; McLaren & Farahmandpur, 2005; Went, 2000) that as a concept, imperialism is a more viable alternative way of understanding global trends.

Why Globalization?

The question remains, why then is the term globalization not discarded hence forth and why is it central to the title of this thesis? Though used differently in a myriad of contexts, the term globalization is part of the everyday discourse of academia, of politics and of popular culture. Within these varying contexts, it does make reference to some form of structural change and of the resistance to these changes. Making an attempt to dismantle the term globalization is critical to understanding how it is used, what it purports to promise, and how it can be used as a perilous maelstrom.

Globalization, it would seem, has become the uncontrollable petulant child of the 21st century to which the response more often than not is a shrug of resignation and the antiphon, "That's globalization". However, it is "more than a symptom of a collective unwillingness to think"(Osterhammel & Petersson, 2005 p. 2). It has been argued that the term has become canonized as it embodies the zeitgeist. Moreover, it has " effectively replaced the term *imperialism* in the lexicon of the privileged class for the purpose of exaggerating the global character of capitalism- as an all-encompassing and indefatigable power that apparently no nation-state has the means to resist or oppose" (McLaren & Farahmandpur, 2005, p.162-3).

As a complex ideological shield, it promotes the belief that the process of globalization is an inevitable *juggernaut* (Morton, 2005) eroding the nation state, and as such, that there is little that can be done to contest this process. Within this paradigm, there is no alternative to globalization and all that remains is for countries to jockey their global power positions to negotiate the best possible deal, usually at the expense of poorer nations. For these reasons, it is important to problematize *globalization.*

Problematizing Globalization

This chapter will discuss how the concept of imperialism as an alternative paradigm is a more feasible way of understanding the dynamics of global change. Branded by well-known neo-liberal slogans such as George Bush's "New World Order" and Margaret Thatcher's T-I-N-A, " There is no alternative", globalization, has been presented as a fundamentally new phenomenon that is expanding rapidly due to innovations in telecommunications.

This chapter will contest this claim and will offer an alternative point of view that globalization represents the continuation of a historical process (Tabb, 1997) and that contrary to much of the globalist literature, the state is not withering away but rather changing. Moreover, it is these changes that must be understood in order for policy as well as resistance to be effective. This chapter will conclude with a general discussion of how neo-liberal globalization can impact education by drawing on the example of the General Agreement on Trade and Services (GATS). It will conclude with a preamble to the subsequent chapter discussing how literacy enters the problematic.

Why Imperialism?

This section will attempt to problematize the all-encompassing, all-determining new phenomenon of globalization. The implication is not that "globalization" as a process is non-existent but rather the continuation of a historical process. The current neo-liberal prescription for globalization maintains that by nations becoming interdependent, they enter into alliances that permit stronger shared economies, mutual interests and shared benefits of exchange. It is clear however, that few experience this broad-stroke representation of globalization. As such, this perspective is a smoke screen that seeks to promote several ideological "truths".

Imperialism, on the other hand, emphasizes "the domination and exploitation by imperial states, multinationals, and banks of less-developed states and labouring classes" (Petras & Veltmeyer, 2004 p. 30). What follows is an exploration of the main tenets embedded in much of globalization theory: that globalization is a new phenomenon sparked in part by the Third Technological-Industrial Revolution, that it results in the withering away of the nation state only to be replaced by a trans-global legal body and that it is inevitable.

New Phenomenon or Latest Development of Capitalism?

For Petras (2004; 2005), the issue of whether globalization constitutes a new phenomenon or the latest development of capitalism holds both a conceptual and empirical dimension. One side of the debate argues that in contrast to claims that globalization is a new "epochal shift" spurred by a technological industrial revolution, the

international flow of capital, goods and labour was higher during the late 19th century. Advocates of globalization argue that the 19th century did not witness the same degree of economic integration as current globalization and moreover, that an integrated global production system was not created at that time. As well, the driving forces fueling current globalization were significantly different, citing proof that the process was advanced by the modern trinity of technological expansion, the growing role of TNCs and the deregulation and liberalization of global markets (Petras, 2004). What follows is an investigation of this argument.

Technology and Globalization

If globalization in a new phenomenon generated from innovative communication technologies, then one would expect that as with previous industrial revolutions, this Technological-Industrial Revolution would be significantly reflected in productivity growth. However, this does not appear to be the case. Wolf (1999) writes in the Financial Times that the period between 1953 and 1973 saw a 2.6 percent growth in productivity while between 1972 and 1995 growth decreased to 1.1 percent (10). Advocates of the globalization info technological debate, counter that growth rate grew significantly during the mid to late 1990s. The prognostications of Alan Greenspan (2000) as well as Business Week and the Economist, all proponents of the computer driven "new economy" revolution, claimed that the benefits of technology were finally reflected in the economy. Others (David, 1990) concurred, stating that the economic benefits of

computers and related technologies, not unlike the benefit of the electric motor at the turn of the century, were merely delayed.

However, the optimism of these pundits, based on a perceived rebound in productivity between 1972-1995, could not endure. Northwestern's Robert J Gordon (1999a, p. 1) maintained that

> ... there is *no* productivity growth acceleration in the 99 percent of the economy located outside the sector which manufactures computer hardware, beyond that which can be explained by price measurement and by a normal (and modest) procyclical response. Indeed, far from exhibiting a productivity acceleration, the productivity slowdown in manufacturing has gotten worse; when computers are stripped out of the durable manufacturing sector, there has been a further productivity slowdown in durable manufacturing in 1995-99 as compared to 1972-95, and no acceleration at all in nondurable manufacturing.

Approximately 70 percent of the "productivity revival", Gordon (1999a) maintains can be accounted for by " measurement improvements in the national accounts deflators" (p. 3). That is, lower estimates of inflation translate to higher growth of real output.

Consequently, in reality there was only a one third of one percent gain in productivity between 1995-1999 because of the Third Scientific Industrial Revolution (TSIR). Moreover, Gordon (1999a) argues further that most of the increase in productivity attributed to computers occurred as a result of the manufacturing of computers. In another article, Gordon (1999b) conducted a longitudinal study of technical progress between 1887 and 1996. According to the results, the period between 1950-

1964 experienced the highest technical progress approximating 1.9 percent multi factor

productivity growth. The lowest period of growth, approximating 0.5, occurred between

1988-1996. It would seem that earlier innovations of the 20th century were more

significant.

Petras (2004) posits that one may go so far as to argue that the new information

systems might have a negative effect on productivity

> ... insofar as they draw a proportionate amount of capital away from more
>
> productive activities and feed into and reinforce 'service' activities, such as
>
> financial speculative investments, that hinder productivity growth.
>
> ... rather than being the wellspring of productivity, or the determinant
>
> of capitalist growth, the new information systems are subordinate elements
>
> to a larger configuration of capitalist institutions- particularly financial- that
>
> influence their use and application (15).

Technology could then be portrayed not as a causal but rather as an "enabling factor" in

the development of international production and transnational firms (Went, 2000).

It follows then that the myth of the Information Age as driving force of

globalization may have a political advantage. On one hand, imputing the revolutionary

Information Age causally with globalization may be an attempt to place " an intellectual

'technological' gloss on the imperial expansion of Euro-American capitalism" by

bypassing " Marxist categories of capitalist expansion-imperialism" (Petras, 2004, 15).

The claim that this technological revolution has in fact created a global economy

obscures the class and power relations that are complicit in developing this latest

development of capitalism. Moreover, as Petras, Gordon and others have argued that no technological revolution affecting the growth of productive forces has in fact occurred, the concept of global economy/global corporation can perhaps be called into question as ambiguous labels, shrouding power relations in the world economy.

Erosion of the State

Another cornerstone of globalization theory espoused by globalists as well as those who are critical of globalization is that the state has become less and less important and is being displaced by a growing set of supranational institutions, such as the World Trade Organization (WTO). Hirst and Thompson (1996) argue that the nation state should no longer be considered the governing power, but rather 'one class of powers and political agencies in a complex system of power from world to local levels' (p.190).

The problem with this argument is that it is too generalized, as the characteristics of a changing nation state vary depending upon the particular case. While some of the power of the state might be reduced, other aspects have been strengthen. Weiss (1997) maintains that arguments such as these overlook state variety and the ability for adaptation. Historically, change is not unique to this period of the nation state. Rather, change has always been at the core of the modern nation state. The argument of the disabled state overlooks both the role of the state to regulate capital as well as the class characteristics of its fundamental structure. Tabb (1997) argues, this idea of the withering state has profound, defeatist political implications and calls for a more nuanced perspective stating that

there is a great deal of difference however between the strong version of
the globalization thesis which requires a new view of the international
economy as one that "subsumes and subordinates national-level
processes" and a more nuanced view that gives a major role to national-
level policies and actors, and the central position not to inexorable
economic forces but to politics.

This *strong version* of the globalization thesis overlooks both the role of the state
to regulate capital as well as an analysis of the "class character of the forces and
institution involved in what is taken as 'globalization' " (Petras & Veltmeyer, 2004, p.
21). For example, Tabb (1997) cites the U.S. labour movement's tendency to support the
'strong version' of the globalization thesis by focusing on the evaporation of jobs to low
wage sites in the Third World. The "runaway shops" argument is indeed valid however
seems to be particularly salient for specific sectors such as the garment trade and the
assembly of technology. Aside from capitalism's cardinal rule that capital seeks out the
lowest possible wages for the maximum amount of profit, there may indeed be reasons
for the labour movement to present this argument. Nonetheless, according to Tabb (1997)
it runs the risk of being an oversimplification.

This insistence of the eroding state within globalization overlooks the investment
pattern of transnationals in that a large majority of U.S. foreign investment and
production by American multinationals is in Western Europe, Canada and other high
wage countries. The investment of which overwhelmingly services these markets.
Moreover, since 1990, the US has been a net importer of foreign direct investment, as

multinationals from other countries have located their production in the US and have

employed US workers. Technology replacing labour has been the main source (Tabb,

1997).

Capitalism as a Global System

The following section argues that capitalism has always been a global system,

even though changes vary historically and nationally. The point of departure for this

discussion is the eleventh century, as during this period capitalism expanded globally. To

understand contemporary globalization, its historical antecedent must also be understood.

Only then can we begin to consider the question, is contemporary globalization different

from that of the past.

Imperialism as Globalization

Mercantile Capitalism

Starting in the eleventh century, Western Europe began, through trade and

conquest, to expand its geographic reach. This period of expansion also marked a period

in Western Europe when feudalism was developing into capitalism. The need for

European merchants to buy cheaply and sell for a profit meant that this trade and

conquest was not seeking an equal exchange with those outside Europe. The volume of

goods that foreign merchants desired to purchase from Europe was not significant enough

to pay for the foreign luxury goods that European merchants wanted to purchase.

European crafts and products would not, for a long time, be that appealing to foreign

traders and markets, to procure the luxury foreign goods that wealthy Europeans desired. Consequently, European merchant adventurers were prone to seize what legal trade could not realize (Magdoff, 1978; Mandel, 1962).

Raids and piracy provided starting capital for many of these "first merchant navigators"(Mandel, 1962, p.102-03). For example, both the Venetians and Genoese made their early profits to establish their trading empires and monopolies by providing naval power and transport for the Christian Crusader armies conquering the Holy Land. As well, during the 15th and 16th centuries, the Portuguese, Spaniards, Dutch and English followed the Italian example by using piracy and violence to create the starting capital for their empires (Mandel, 1962).

The inevitable result of Western European expansion from the 11th century onwards was the form of imperialism called colonialism, also referred to as mercantilism or mercantile capitalism. The original Western European goal of trade with the East, was compromised as trader-explorers soon found that the sought after profit could be made by conquering the source of cheap labour, raw material and products of others. For example, Columbus' navigational miscalculation in not finding Asia, coupled with pressure from his financiers to produce profit, led to the island of Hispaniola becoming a colony of Spain.

Moreover, Columbus' second voyage resulted in the introduction of "Old World" sugar cane to be grown for sale to Europeans who considered the crop to be "white gold" in Europe (Galeano, 1973, p.71). The Taino Amerindians were forced to provide the cheap labour for production in return for being made into Christians *at the point of a sword* (Galeano, 1973). Europeans could excuse themselves as being benevolent

Christians, bestowing their definition of civilization and Christian salvation on "less civilized pagans"; in return, colonial conquest was the price recipients had to pay. At the price of native genocide on a scale still undetermined in its vastness, the world straddling colonial empires of Spain and Portugal in particular, were built by siphoning off vast wealth (Galeano, 1973).

As European colonialism spread to different parts of the world, the pattern was remarkably similar. That is, some form of forced labour was established, producing cheap raw materials and capital that would be sent back to the European economic elite to produce the goods Europeans wanted and needed for legitimate commerce. Spain and Portugal invested little in the manufacturing of domestic craft production. Most of the capital and raw materials from colonies on three continents was owed to other Europeans to pay off the ever-increasing debts of conquest and maintenance of empire and religions and imperial wars, as well as, the lavish expenditures of the elite (Mandel, 1978).

England, Holland and France joined the colonial scramble later. Whereas all three nations were eventually to become heavily involved in colonialism and the African slave trade, England was ultimately to become the most successful due to its defeat of the Spanish Armada in 1588. England then forced Spain to surrender the "asiento" or the royal monopoly on African slave trade. (Galeano, 1973. p. 93) With the Spanish empire stretching halfway around the globe and its native labour dying off due to European diseases and Spanish abuses, African slaves became essential, particularly to the functioning of many New World mines, plantations and ranches (ibid, 1973).

British Imperialism

In the next two centuries, the immense profit of the African slave trade, England's economic conquest of Portugal after the Methuen Treaty in 1703 and the effects of companies such as the East India Company, placed the British business class in an especially advantageous position. As an island that had not been an important target for continental merchants, England had earlier started a successful craft production base and a merchant marine and national and professional navy through blatant protectionist policies (Magdoff, 1978).

By the 1700s, with such a monumental infusion of profits from abroad, English businessmen who wanted to increase the volume of manufacturing production, began to invest their vast "risk capital" into scientific research and inventions. As a result of the British business elite funding the "Scientific-Industrial Revolution", English agriculture, transport and manufacturing reaped the benefits of scientific advancement and British manufacturing became dominant globally (Galeano, 1973; Magdoff, 1978).

Neo-Imperialism

By the early 1800s, due to inventions creating mass production on an unprecedented scale, England was creating the greatest number of manufactures for the cheapest price and could undersell almost any goods produced worldwide. England was now poised to control much more of the world's economy, even though her colonies covered a vast portion of the globe. By endorsing independence for other nations'

colonies, promoting Free Trade instead of protectionism for other nations and freedom from slavery, English businessmen could amass even greater profits than during their building of colonialism, the slave trade and protectionism. Colonialism had clearly become a liability in 19th century England (Galeano, 1973; Magdoff, 1978).

English industrialists were mass-producing in such volume that they now needed larger markets of global proportion, corresponding sources of cheap wage labour and raw materials no longer available within the now limited confines of their colonial empire.

> Under the pressures and opportunities of the later decades of the nineteenth century, more and more of the world was drawn upon as primary producers for the industrialized nation. Self-contained economic regions dissolved into a world economy, involving an international division of labor whereby the leading industrial nations made and sold manufactured products and the rest of the world supplied them with raw materials and food. (Magdoff, 1978 p. 37)

The 19th century began to hear a new dogma of 'liberalism" within parliament, as the new industrial class began to flex their political power. The earlier doctrine of mercantilism was replaced by the *laissez-faire* liberalism of Adam Smith. Having been protectionist to become an industrial power, England now proposed "Free Trade" for the world. England did not want other nations to stop cheaper English manufacturers from entering their countries and underselling their local goods, thereby, leaving those other nations as mere suppliers of cheap raw materials to English companies (Magdoff, 1978).

Allowing others to follow the lessons of England's protected industrial development would be dangerous. Now that the British Admiralty ruled the seas, Britain could turn its attention to more selective colonies and particularly those with ports, strategically placed throughout the world. Should any other government attempt to practice protectionism, the rapid response of British sea power would soon be dispatched from these strategically placed ports to squelch renegade dissenters and restore Free Trade. The Opium War of 1842 in which the English crushed Chinese attempts to stop the English Opium Trade into China through outright war is a revealing example of such a British military response (Magdoff, 1978).

Whatever fraction of the earth's surface England's official colonies constituted by the end of the 19th century, England controlled a much larger proportion of the world economy due to its ability to force other nations to practice Free Trade, the essence of neo-imperialism. English manufacturers had little competition for control of world markets until after WWI, when the United States became the nation mass-producing the cheapest manufactured goods and began to supplant England in that role.

U.S. Imperialism

Having been born of a revolution against English colonialism, the United States in the 19th century would eventually build its own empire by either conquering, or by buying cheaply under the threat of occupation and conquest, most of what is within its national boundaries today. It would also safeguard its own new industries choosing to adopt protectionism rather than practice free trade because that would allow the cheaper goods of its former colonial masters to enter

and dominate its economy. A United States failed attempt to "liberate" Upper and

Lower Canada in the War of 1812 left the U.S. with the realization that its armed

forces were no match for a motivated British army and their Amerindian allies, let

alone the Royal Navy. Consequently, the U.S. would strategically avoid British

dominated territories and expand its reach to claim Napoleon's Louisiana, Hawa'ii,

Russian Alaska, Spanish Florida and a large portion of Northern Mexico

(Galeano, 1973; Magdoff, 1978).

By the start of the 20th century, the United States had consolidated its continental

borders and accelerated by a violent civil war, had achieved industrial and military power

that freed it from fear of provoking British military retaliation. No longer needing to be

prudent, the United States seized several Spanish colonies in the Spanish-American War

starting in 1898. By 1903, an aggressive hero of that war, now President Theodore

Roosevelt, seized a part of Colombia to make the new nation of Panama. Britain and

France were debating who would build a canal through Colombia. Panama gave the

rights to its creators, the United States (Galeano, 1973; LaFaber, 1983).

Soon the U.S. Marines were following their nation's business elite into places like

Central America. For much of the 1800s, these entrepreneurs accompanied often by their

own private armies, had been buying and seizing resources where the U.S. military dared

not go. Over time, the local reformers and revolutionaries attempted to rid themselves of

the corrupt governments that had in turn been installed or influenced by U.S. business

interests. The Central American Liberals even believed that by forming one large Central

American country, it would be easier to ward off U.S influence and corruption. However,

the U.S. military could now intervene to protect and control U.S. interests and occupy countries without the British military stopping them (LaFaber, 1983).

The United States refused to enter WWI in 1914 but lent Britain and France massive amounts of capital to buy U.S. military equipment. Britain and France ended the war heavily in debt to the United States. Not wishing its debtors to lose the war, the United States tipped the war in favour of the Allies by lately entering the war on the allies' side to assure victory in 1918. World War I devastated England and replaced it with the United States as the next candidate for the world's dominant industrial nation.

With the cheapest goods to sell, after WWII, the U.S. changed its policy from protectionism to free trade as had England before it. The U.S. called this an "Open Door" policy. Soon, it became clear that all U.S. diplomacy, trade, aid and military intervention were aimed at not allowing others to practice protective barriers or "closed doors" to U.S. goods and investments. Their doors would be open even if the U.S. had to kick them in. (Galeano, 1973; LaFaber, 1983).

However, keeping nations practicing "free trade" or the "open door" was not as easy for the United States as Britain had found it in the previous century. After a vote at the 1928 Pan American Conference in Havana that shamed the U.S. into withdrawing its marine garrisons from Latin American soil, the U.S. began to train and supply local Latin American armed forces that could overthrow their local political leaders if they did not keep the "doors open" (LaFeber, 1983).

World War II enhanced and consolidated the U.S. status as the dominant industrial nation in the world. The newly revived communist threat also gave the U.S. an excuse to sanction military aid and interventions to eliminate foreign leaders who were not in favour of its open door policy. Versions of this policy marked the U.S. strategy for the rest of the 20th century and up to the present day. One of the major challenges confronting the U.S. during the post WWII period was its need to develop and maintain strategies to keep former colonial nations from straying from the imperialist fray, so as to maintain control of their raw materials as well as for trade and investment (Magdoff, 1978 p.110).

> This has been facilitated by the method of de-colonialization itself, whereby the main economic and financial components of dependency have been maintained intact. To this have been added the various so-called foreign-aid programs, and the controls supervised by such organizations as the World Bank, the International Monetary Fund and the European Economic Community.

As post WWII Keynesian economic practices supported welfare state reforms and bolstered economic growth that helped establish higher living standards, lower unemployment, stronger unions and the expansion of social and welfare services (Mandel, 1978), the seeds of neo-liberal globalization were also being sown. Both the Bretton Woods Conference of 1944 and the larger post

WWII period of reconstruction set the groundwork for what many consider contemporary neo-liberal globalization.

Participants of Bretton Woods committed to expand international trade as well as to establish binding rules to control trade relations by establishing the International Monetary Fund (IMF) and the International Bank for Reconstruction and Development, soon to become known as the World Bank (WB), as well as, the International Trade Organization (ITO) whose mandate was to establish trade regulations between countries (Steger, 2003). The ITO charter was agreed at the UN Conference on Trade and Employment in Havana in March 1948 but was never ratified, as the US withdrew its support. Only one part of the ITO, backed by the U.S., survived, the General Agreement on Tariffs and Trade (GATT).

The late 1960s and early 1970s bore witness to economic recession and severe fiscal restraints due to a period of over-accumulation of capital resulting in a drop in product profitability and an ensuing decrease in production (Petras & Veltmeyer, 2004). For the next thirty-five years, neo-liberal prescriptions have dominated policies that have been labeled as or attributed to globalization. Seven rounds of negotiations took place under the GATT.

The eighth round, known as the Uruguay Round, lasted nine years absorbing the general principles of the GATT and created the establishment of the World Trade Organization (WTO), as well as, the General Agreement on Trade in Services (GATS). The WTO then became responsible for the "implementation of the *tripod* of agreements reached during the Uruguay Round in 1994 – GATT, GATS, and Trade-Related Aspects of Intellectual Property Rights (TRIPS)"(Robertson, Bonal & Dale, 2002 p. 8). What was

exceptional about this agreement was that for the first time intellectual copyright, and services that held a long tradition of being governmentally regulated, such as, health care, water and education would be considered as commodities, open to the most powerful bidder.

Neo-liberalism

If, as this thesis has argued, the concept of globalization is a complex ideological shield that masks the imperialism of global capitalism, then the over arching prescription of neo-liberalism is the inextricable bedrock of New World Order globalization. As Olssen, Codd and O'Neill (2004) maintain, "… it is the imposed policies of neo-liberal governmentality, rather than globalization as such, that is the key force affecting (and undermining) nation-states today" (p.13).

Roots of Neo-Liberalism

Neo-liberalism or "capitalism with the gloves off" (McLaren & Farahamandpur, 2005, p. 15) is rooted in the eighteenth century liberal ideals of British philosophers Adam Smith and David Ricardo who viewed the market as a self-regulating mechanism. They maintained that eventually the market would arrive at a balance between supply and demand, resulting in the best possible distribution of resources. Later, British sociologist, Herbert Spencer added a social Darwinian element by stating that the fittest would succeed in a free market economy (Steger, 2003).

Just as 19th century England had changed from protectionism to Free Trade to extend its economic hegemony, so too would the United States and other less dominant powers of the 20th century shift from Keynesian economics to the market-driven forces of neo-liberalism. Advocates of neo-liberalism predicted that by reducing the power of the state, encouraging and expanding free trade by the removal of tariffs and regulations and by practicing fiscal restraint, renewed development and the reduction of poverty would occur. Embraced by many developing countries as a way of spreading democracy, neo-liberal reforms were marketed as the gatekeeper of global inequality whose presence could catapult developing nations into a prosperous 21st century. However, the reality was that only the mighty would benefit.

Education and Neo-Liberalism

As the 1970s unfolded, significant changes were taking place in the world economy resulting in a new kind of political rationality, dubbed the 'Washington Consensus', promoting privatization, free trade and deregulation. As the General Agreement on Tariffs and Trade (GATT) focused on international trade in goods that had fewer, rather than more regulations, transnational corporations intensified pressure for free trade expansion to increase their wealth and power base. At the same time, the service sectors of developed countries, in particular, health and education, were growing rapidly and seemed the most logical area to exploit for future profit (Robertson, 2003).

As a result of the pressures to expand trade and profit, the Uruguay Round of GATT negotiations, spearheaded by the U.S., created the General Agreement of Trade in Services (GATS). The creation of the GATS was the result of an aggressive, sustained

lobby by the U.S. Coalition of Service Industries headed by major banks and insurance companies. By 2002, U.S. education services export swelled to 12.8 billion dollars while imports accounted for 2.5 billion netting 10.3 billion in surplus (U.S. International Trade Commission, 2004, p. 5-1). If there had been any doubt in the past, there was now no uncertainty. The classification of education as a significant service commodity had arrived.

Kelsey (2003) cautions that it is important to analyze the GATS not within the framework of the World Trade Organization (WTO) but rather to view GATS within the WTO as a "politico-ideological phenomenon", one that "creates, defines and maintains power relations"(Kelsey, 2003 p. 267). Terms such as *general agreement, trade* and *most favored nation* from a politico-ideological perspective are hardly neutral when one considers whose interests are being served. For example, the WTO's *most favored nation* rule maintains that the best treatment be granted to all foreign service providers. The implication of this for education is that if education is classified as a "service" then any aspect of that service is open to foreign competition. All aspects, including the hiring and firing of teachers, curriculum development, the private ownership or operation of schools would fall under the corporate model. The private corporation would have the right to challenge the law in matters of salaries as well as established standards and policies (Edsall, 2000).

So far, GATS has not come to pass as threatened. While some would claim that the agreement has been smited, others claim that it may be resurrected in another, perhaps, more insidious form. Nevertheless, neo-liberal education reforms have not waited for the ratification of GATS. Policy studies, echoed by both print and visual

media, claim that national economies suffer because a large number of adults in the work

force lack the literacy and numeracy skills necessary to succeed in today's competitive

global market and that schools are not providing all children and adolescents the

necessary instruction to become economically stable adults.

Implemented to answer the urgent cries of nations at risk, OECD backed

education reforms in the last decade have promised accountability, competency based

education and promises of financial security and employment through *life long leaning*.

Examples of neo-liberal values in education are indicative throughout the lifespan. From

legislative packages, such as, No Child Left Behind (NCLB) through to adult Life Long

Learning initiatives targeting adult literacy and numeracy skills, seek to create a

privatized system of public education that has a narrow, vocationalized curriculum

enforced through use of standardized tests while selling the promise that education is the

cure for social inequality, poverty and marginalization.

Chapter Summary

This chapter has attempted an exploration of the context for this thesis,

globalization. It has ended with an example of how the political project of neo-liberal

globalization is impacting education, as educational policies are never detached from the

historical, the economic, the social and the political.

It should be noted that this chapter offers a preliminary exploration of both

globalization as well as neo-liberalism and that a more comprehensive and nuanced

perspective would be required for any future research. The next chapter explores how

literacy has become one of the predominant social narratives of late 20th and early 21st century educational policy. It begins where Chapter 2 has left off, briefly exploring the feverish drive for global educational reform.

Chapter 3

Literacy

The prevalence of low literacy skills in Canada continues to be a
nationwide problem…Without these foundation skills, individuals
are extremely limited, not only in terms of their ability to learn,
but also in their ability to function fully in society.

Longfield, J., Raising Adult Literacy Skills: The Necessity of a
Pan-Canadian Response

The labels "literate" and "illiterate" almost always imply more
in common usage than a degree or deficiency of skill. They are,
grossly or subtly, sociocultural judgements laden with approbation,
disapproval, or pity, about the character and "place", the worthiness
and prospects, of persons and groups of people.

Knoblauch & Brannon, Critical Teaching and the Idea of Literacy, P.15

"The slogan "back to basics"," as Luke (1988, p.1) maintains, " is an historical

locution" that has no tangible historical genesis. What is certain though, is that whenever

this call to arms is posited, it is accompanied by an idealized memory of a time when

education was perceived as being less permissive, more successfully utilitarian and

when students were better prepared for the future. The desire to retreat to an idealized

time may be a reaction to perceived social, political or economic threat but this cry,

more often than not, signals a renewed thrust in empire-building (Luke & Carrington,

2002). Almost always, the uncontested scapegoat of these crises is an inadequate

education system.

Currently, the re- emergence of a sense of urgency enveloping education at all levels is exemplified through popularized education campaigns, such as, *No Child Left Behind* (NCLB) and adult *Life Long Learning* initiatives. Within the global economic framework, the fear of falling standards, of being overtaken economically by other countries, has re-fueled intense interest in education as the policy solution for the future success of nations. As with other areas of the public sector such as health, education is being remade to buttress the perceived runaway demands of global capitalism and in the process risks losing its fabric as a social good. The lynchpin of this new world order education policy is literacy.

Literacy has been deemed vital to the success of both career and personal aspirations. In countries with reported greater literacy skills, literacy is attributed to better economic performance, a healthier population and greater overall employment. Moreover, literacy within the context of globalization has changed from merely the ability to read, to the ability to possess a set of knowledge skills that are inextricably linked to the development of science, technology and work (Statistics Canada, 2004, 81-004-XIE). Mirroring the ideological stance of progrmmes such as NCLB, literacy has become the key indicator of educational progress in the extent to which schools endow their students with these skills.

This perceived Diaspora knows no geographical boundaries. According to a recent newspaper article entitled, *Literacy a battle for 42% of adults* (Montreal Gazette, May, 2005), nearly half of Canadian adults lack the necessary literacy skills to perform adequately in today's society and approximately one in seven adults, that is, over 3 million Canadians, has difficulty reading basic printed material and is ill prepared for

today's so called *knowledge-based* society. Fashioned from Statistics Canada and the

Organization for Economic Cooperation and Development's (OECD) 2003 Adult

Literacy and Life Skills Survey (ALL), these results paint a striking picture.

The ALL survey tested over 23,000 Canadians on four scales of skill proficiency.

The scales, which were further divided into five literacy levels, purported to test the

prose, document-comprehension, numeracy and problem solving skills of its participants.

Canada placed solidly in the middle of the "pack" of the seven countries participating in

the survey, scoring slightly ahead of the United States. The initial survey was also

conducted in Italy, Norway, Switzerland, Bermuda and the state of Neuvo Leon, Mexico.

Within the context of this survey, results construct a narrative that 'literacy' is

universal and value free. Surveys that attempt to quantify literacy not only reinforce the

myth that the promise of literacy is prosperity and the trappings of an idealized life

(Graff, 1979) but that there is only one way to think, to act, to be, that will lead to this

idealized life.

Manufacturing Literacy

Traditionally defined as the ability to read and write in page-bound, official

standard forms and *more often than not*, in the official language (Cazden, Cope,

Fairclough et al, 1996), literacy has been presented as a master tool. As Adama Ouane

(UNESCO, 2002) put it, literacy is "the key to the toolbox that contains empowerment".

Within this paradigm, literacy is positively correlated with social mobility, health,

employment and the list continues. Its antithesis, illiteracy, has been pinpointed as one of

the primary causes of low productivity, high unemployment, poverty, famine and poor health. Further positive correlations have been suggested between illiteracy and fertility and mortality rates as well as, average life expectancy and per capita income (UNESCO, 2002).

Literacy, it would seem, has become central to educational practice, curriculum development and policymaking. Lankshear (1999, p.8) maintained that " talk of literacy in relation to school-based learning and teacher education has become increasingly common" with the term replacing stalwart policy hallmarks such as 'reading' and 'writing'. However, literacy did not always have such a hegemonic position in educational discourse. Rather, the long-established field of 'reading' reigned. Much of the research in the area of reading was grounded in psychology and focused on how to teach children within the school system to decode and encode printed texts (Lankshear & Knobel, 2003).

The term 'literacy' had its foray into non-formal education, prior to the 1970s, as the name given to instruction programmes aimed at teaching primarily 'illiterate' adults how to read and write. At that time, official census statistics of First World developed English speaking countries such as Britain, Australia, Canada and the United States indicated almost zero levels of illiteracy. As a result, literacy programmes were considered peripheral, as the majority of the population did not need them. What did develop were few, usually volunteer run, literacy programmes aimed at giving "illiterate" adults, perceived as living on the fringe of society, a "second chance" by teaching them how to read and write (Graff, 1987).

However, during the 1970s, events transpired to change this perspective. Fueled by the effects of post-industrialism, restructuring of the labour market and profound structural changes in the economy, many were seen as being unprepared to meet these changes. Suddenly, it would seem, previous reports of virtually non-existent levels of illiteracy were inverted and a "literacy crisis" had appeared. Where illiteracy was the anomaly, now large numbers of adults were deemed illiterate.

A social narrative developed claiming that not only were adults unable to meet the demands of the changing labour force within *globalization* but that schools were adding to this crisis, as children were being ill-equipped for careers in this new millennium. As a result, government reports were commissioned, and research funds were readily available to determine the state of affairs. Consistently, the results indicated that nations were falling behind.

Drastic educational reforms were needed to overhaul the system, ensuring that a newly revised minimum level of 'functional' literacy be acquired by all. Moreover, to ensure that standardization was possible, literacy would need to be quantified. Measuring literacy through instruments, such as the International Adult Literacy Survey (AILS) and the Adult Literacy and Life Skills Survey (ALLS), came of age during the 1980s when neo-liberal policies of globalization were becoming entrenched in education policy. As a result, Literacy with a capital L became a recognized commodity.

The following section will discuss "functional" literacy and then explore how the meaning of functional literacy has changed in response to "globalization". A critique of this consensual perception of functional literacy within the context of globalization will follow. This critique will draw from approaches housed under the umbrella term, New

Literacy Studies (Barton & Hamilton, 1998; Gee, 1992; Heath, 1983; Street, 1996).

Functional Literacy

What defines functional literacy has evolved over time. Initially the ability to read and write one's name was considered the benchmark. In 1951, UNESCO defined a person as literate if they could, with understanding, read and write a short simple statement about everyday life (UNESCO, 1965). In 2002, UNESCO's Institute for Statistics' definition of functional literacy became more complex, as an individual was considered functionally literate if they could "engage in all those activities in which literacy is required for effective function of his or her group or community and also for enabling him or her to continue to use reading, writing and calculation for his or her own and the community's development" (UNESCO, 2002). The Organization for Economic Cooperative Development (OECD), which will be discussed in greater detail shortly, defines functional literacy not just as the ability to read or write but also as "whether a person is able to understand and employ information in daily life, at home, at work and in the community".

If descriptions of functional literacy have changed and have been re-quantified over time to reflect the redefined needs of empire building, Gee (1999) argues that the ideological undercurrent remains constant, as the definition of functional literacy cuts across historical and political timelines by describing being functionally literate as having the necessary skills to function in society at basic levels without imperiling the dominant class. What is interesting though is that the language pertaining to literacy

within the current prescription of capitalism, neo-liberalism, seems to have adopted a "kinder, more gentle" form of rhetoric. What appears to be a shift away from hierarchical power relations is actually a strategy to promote the political project of neo-liberalism: the reduction of the power of the state, the promotion and expansion of free trade by the removal of tariffs and regulations and the practice of fiscal restraint. What follows is an exploration of New Work Order literacy in the context of neo-liberal globalization or *new capitalism.*

New Work Order

Definitions of functional literacy discussed in the previous section were developed to meet the demands of industrial, mass-market capitalism prior to the 1970s. Dubbed "old capitalism", the post WWII period to the early 1970s witnessed monumental growth and ensuing demand for the mass production of consumer goods, the development of strategies to compete for consumer markets and the proliferation of corporations. Labour lines were clearly drawn, as industry required low level workers hired "from the neck down" to do tedious, repetitive tasks while middle managers who were usually business school trained professionals, supervised (Gee, Hull & Lankshear, 1996).

The 1970s witnessed a world recession, the disposal of large number of products, layoffs and ensuing labour upheaval. In an attempt to remain an economic player in the global marketplace, Western business practices looked to the Japanese whose growing success rebuilding after WWII could be in part attributed to the Total Quality movement

spearheaded by Deming (1986) and Workplace 2000 (Boyett & Conn, 1992 in Gee, Hull & Lankshear, 1996). In contrast to the practice of hierarchical labour relations, the Total Quality movement espoused shared goals and company loyalty, the cornerstone values and practices of the New Work Order (Gee, Hull & Lankshear, 1996).

The shift from post WWII Keynesian economics to the market-driven forces of neo-liberalism sought to reduce the power of the state and to encourage and expand free trade by the removal of tariffs and regulations. Competition went into hyper drive as it was hoisted upon the global stage. The market economy, already saturated with a plethora of products, was compelled to produce the best for the least amount in the shortest amount of time and for the most people (Klein, 2000). The large group of middle managers prevalent to old capitalist practices has been greatly reduced. The nature and structure of work has been and continues to be re-created to meet these parameters.

With this change, knowledge that was originally filtered through and interpreted by middle management is being pushed down to workers who have been designated as associates/ partners/or knowledge workers in the language of new capitalism. As well, in the language of new capitalism, bosses have transformed into coaches or leaders who are expected to inspire and the drastically reduced number of middle managers have become team leaders (Gee, Hull & Lankshear, 1996). From a big picture perspective, the changes discussed are components, the sum of which is much greater than the parts, as what the new work order of new capitalism has created is a new powerful Discourse (Gee, 1996).

The knowledge workers of *new capitalism* are expected to work as part of a team yet be independent, learn with little training, interact with complex technology, adapt to new demands quickly, evaluate their own progress and be able to express their work

related needs all to meet and exceed the goal of continuous quality improvement needed

for an organization to remain competitive and to survive. Importance is now placed on

the knowledge that it requires to create, efficiently produce, market and transform

products that are customized to meet the perceived needs of a niche market or individuals

(Klein, 2000).

On the surface, stratified labor relations have given way to blended work teams

that constitute nonhierarchical communities of practice. Organizations talk of

empowering their associates; they speak of liberation, collaboration, trust and above all, a

unified vision. However, as Gee, Hull and Lankshear (1996) maintain the dilemma in

this New Work Order is an organization's desperate need to sustain a level of fervor and

commitment from their workers so that they will remain competitive.

> Workers trained in the old capitalism may have a very hard time adapting or
>
> adjusting their attitudes toward work and workplaces. In fact there is a danger of
>
> widespread cynicism in the workforce, based on the idea that fast capitalist
>
> practice are meant to 'dupe' the worker into working harder and longer for less
>
> reward- or at least with greater risk- in the service of elites who still formulate the
>
> basic vision in their own interests (p. 31).

One of the most effective ways to eradicate this cynicism and resistance is by

ensuring that education reforms and programmes normalize the 'reality' of new

capitalism while inculcating the values and the fears required to manage the new work

force. The Adult Literacy and Life Skills Survey (ALLS), seen within this lens, does not

measure skills which are universal and neutral but rather represents only one form of

literacy, that of *new capitalism,* that is, neo-liberal "capitalism with the gloves off"

globalization (McLaren & Farahmandpur, 2005). In contrast, the work conducted within

the approach of New Literacy Studies considers literacy from a sociocultural perspective

understood in the "context of social, cultural, political, economic and historical practices

to which they are integral" (Lankshear, 1999). What follows is a discussion of this

approach.

New Literacy Studies

New Literacy Studies is part of a larger movement coined the "Social Turn" (Gee,

1999) where the focus has shifted and is continuing to shift from the individual and the

private mind perspective towards a more social and interactive worldview. Gee's (1999)

baker's dozen homage to these distinct fields of study, touches upon some of the areas

involved within this paradigm shift. They range from linguistics, the psychology of

Vygotsky and Bakhtin, connectionism, evolutionary approaches to the study of mind and

behaviour, modern composition theory and narrative study, modern sociology and

postmodernist discourse work. The shared link among these distinct areas of study is the

argument that there is a dialectical relationship between human practice and the context

in which it is produced, developed, experienced, shared, disseminated and contested.

New Literacy Studies (NLS) (Gee, 1991; Street 1996) considers literacy not from

the skills based perspective of the dominant functional approach discussed previously but

rather, as a social practice (Street, 1985). Street (2003, p. 78) elaborates upon this distinction stating that New Literacy Studies

> ...entails the recognition of multiple literacies, varying according to time and space, but also contested in relations of power. NLS then takes nothing for granted with respect to literacy and the social practices with which it became associated, problematizing what counts as literacy at any time and place and asking "whose literacies" are dominant and whose are marginalized or resistant.

For this reason, New Literacy Studies views functional literacy from another perspective, referred to as the *autonomous model* of literacy. "Autonomous" literacy assumes that literacy, "in itself- autonomously- will have effects on other social and cognitive practices" (Street, 2001, p. 7). The implication is that literacy is bestowed upon people impartially and that the "social" consequences resulting from it are felt after the fact. The problem with this model is that it positions literacy as a universal and neutral construct that obscures the cultural and ideological assumptions that are behind it, as well as the complexity of the problems it purports to alleviate.

Street (2001) proposes an alternate approach, the *ideological model*, arguing that literacy is a social practice that varies depending on the particular time and place. Fundamentally, this perspective invites an epistemological shift in that the manner in which individuals or groups deal with reading and writing are rooted in social constructions of reality. Literacy then is embedded in social, cultural, institutional and political practices. New Literacy Studies considers literacy and the acquisition of literacy, as they are part of oral language, social practices, sites and the myriad of

cultural ways of thinking, knowing and being (Gee, 1999). It then becomes more logical not to speak of a single, neutral, overarching form of literacy but rather multiple literacies. In this way, literacy is always contested; it is always political.

From the lens of New Literacy Studies, surveys such as the ALLS that seek to quantify literacy/illiteracy are often meaningless because the 'literacy' they attempt to measure is decontextualized. Moreover, what is not addressed is that the *literacy* that is represented by surveys such as the ALLS is laden with hushed ideological and policy presuppositions. What is needed is an ethnographic approach. By talking and listening to people and then connecting what they say and do, Street (2001, 2003) maintains that we can have a better idea of what literacy are meaningful to them. Accordingly, the literacy defined by a survey may have little relevance to the literacies that are played out in daily life.

Literacy and illiteracy quantified through instruments such as the Adult Literacy and Life Skills Survey privileges a certain brand of literacy. What New Literacy Studies research does differently is to suspend judgment until it is understood what constitutes literacy for the group in question and from what social contexts reading and writing is significant (Street, 2005). By employing this approach, more often than not, those who are judged to be illiterate within the autonomous framework, use literacy in contexts and practices that are meaningful to them. Consequently, the lines between literate and non-literate are nowhere as predictable and defined as measures, such as the Adult Literacy and Life Skills Survey, report.

The Adult Literacy and Life Skills survey will be the subject for analysis in Chapter 4. Before an analysis of some of the questions included in the ALLS can be

attempted, it is important to discuss the Organization for Economic Co-operation and Development (OECD), the driving force behind much of Western education as well as literacy policy. It is particularly important to understand how the OECD works and it how it formulates policy specifically within the context of "globalization".

Interrogating the OECD

What is the OECD?

The Organization for Economic Co-operation and Development (OECD) can be defined simultaneously in a multiplicity of ways as a geographic entity, an organizational structure, a policy-making forum, a network of policy makers, a group of researchers and consultants as well as a sphere of influence (Henry, Lingard, Rizve & Taylor, 2001, p.7). It has been positioned as the most influential international organization of education policy in the western world (Eide, 1990), though its reach has extended significantly beyond the member states who joined initially at it inception in 1961.

Described as a think tank by some or as a rich man's club by others (Istance, 1996), the OECD's policies have been characterized as falling somewhere between the uncompromising rigidity of the World Bank and the flexibility of UNESCO. The OECD describes itself as " a club of like-minded countries" whose membership is derived from countries who produce two thirds of the world's goods and services. Membership, it maintains, is not exclusive as the prerequisite for joining is the commitment to both a market economy and a pluralistic democracy (OECD, 1997).

Others are not convinced by the Oz-like persona of this Organization. Keith

Fisher (2000) of Corporate Watch, a radical research and publishing group located in

Oxford, England, volunteers yet another descriptor for the Organization, that of corporate

mouthpiece. He posits (Fisher, 2000)

> If the World Trade Organisation (WTO), International Monetary Fund (IMF) and
>
> World Bank are the body of globalization's dark side, the Organization for
>
> Economic Co-operation and Development (OECD) is its head. ... the OECD is
>
> the source of the ideology which drives them. It is the crude, lumbering think-tank
>
> of the most wealthy nations, bulldozing over human dignity without pause for
>
> thought. Its tracks, crushed into the barren dereliction left behind, spell 'global
>
> free market'.

Fisher's argument is compelling as he peels away layers of historical events while

demonstrating how the OECD functions as an organization that represents a corporate

free market agenda.

Fisher (2000) has accused the OECD of style over substance in the creation of its

Guidelines (OECD, 2000) for best practices in the running of transnational corporations

within a 'free' market. He argues that as these guidelines are not legally binding and

constitute a voluntary code of conduct, they amount to little more than "the view that

human rights and environmental issues need to be addressed to the extent that they can

impact on corporate reputation and therefore, ultimately, on profits" (Fisher, 2000).

Fisher cites the OECD's (OECD, 2000) motivation for creating the guidelines:

many multinational enterprises have demonstrated that respect for high standards

of business conduct can enhance growth. Today's competitive forces are intense

and multinational enterprises face a variety of legal, social and regulatory settings.

In this context, some enterprises may be tempted to neglect appropriate standards

and principles of conduct in an attempt to gain undue competitive advantage.

Such practices by the few may call into question the reputation of the many and

may give rise to public concerns,

Fisher (2000) speculates whether the phrase, "a variety of legal social and regulatory

settings" is a euphemism for describing Premier Oil's abuse of human rights in Burma

or BP's involvement in Colombia. Such "practices" he further speculates, may

contribute to crimes against humanity.

Inception of OECD

The historical roots of the OECD lie in its predecessor, the Organization for

European Cooperation (OEEC), funded under the Marshall Plan for the economic

restructuring of Europe after World War II. As mentioned previously in Chapter 2, some

of the major challenges confronting the Unites States during this period were the

development and maintenance of strategies to protect its economic and political

dominance as well as the need to avert any further Communist threat by preventing other countries from straying from the imperialist fray (Magdoff, 1978). Economic power structures established during this period of economic restructuring such as, the International Monetary Fund (IMF), the World Bank and the then, General Agreement on Trade and Tariffs (GATT) which was transformed into the World Trade Organization (WTO), have remained dominant since their Bretton Woods inception in 1944.

By the late 1950s, the OEEC had accomplished its major objective, European economic recovery, and was able to shift its focus to structural concerns as addressed by the newly formed European Productivity Agency (EPA) (Papadopoulos, 1994, p. 22).

Facilitated by a grant from the United States of a sum of $100 million... the Agency played a leading role in fostering the spread and development of productivity concepts and of managerial skills and techniques, drawing heavily on US experience. The adjustment of training to the requirements of modern economies came to be seen as a fundamental condition of progress and considerable effort went into training at all levels and in all sectors of activity, particularly technical and vocational training...

The period of the late 1950s saw a proliferation of Committees and Working Groups, backed by predominantly US funds that focused on the growth of science and technology. Reeling from Sputnik shock, the combination of a US Department of Defense grant of $500,000 and a pledge from European members to match that sum resulted in the establishment of the Office for Scientific and Technical Personnel (OSTP).

The OSTP was established as part of a strategy to address the success of the Soviet educational system's emphasis on science and technology (Papadopoulos, 1994). The US who had not been an "official" member of the OEEC committed to becoming a fully participating member of this programme. This signaled a shift from the original European membership of the OEEC to a more global effort and with this shift the Organization for Economic Cooperation and Development (OECD) was formed in 1961.

OECD Membership

The OECD, extending the political, economic and geographical limits of the OEEC, is comprised of the government representatives of twenty-nine of the wealthiest Western countries. As with the OEEC, it is located in the Chateau de la Muette, Paris. The initial 1961 members included: Austria, Belgium, Canada, Denmark, France, Germany, Greece, Iceland, Ireland, Italy, Luxemburg, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, the United Kingdom, and the United States. It was joined later by Japan in 1964, Finland in 1969, Australia in 1971, and New Zealand in 1973 (Henry, Lingard, Rizvi, & Taylor, 2001). However, since the 1990s membership has changed. After a gap of twenty-years membership expanded to include Mexico in 1994, the Czech Republic in 1995 and Hungary, Korea and Poland in 1996.

What follows is a basic historical overview of education policy in the OECD. Though a more detailed and complex analysis would be necessary to fully explain the historical and political influence the OECD has had and continues to exert in educational policy, it is beyond the scope of this thesis.

OECD and Education

According George Papadopoulos, who prior to his retirement in 1991 was the

Deputy Director of OECD's Education Directorate as well as a senior officer responsible

for the Centre for Educational Research and Innovation (CERI), an overview of the

history of education at the OECD can be divided into two distinct epochs paralleling

Keynesian and post Keynesian periods and separated by the recession of the mid 1970s.

The initial 'golden era of growth' was typified by economic, demographic and

educational development with particular emphasis placed on "social and equity

objectives" and with " a great deal of experimentation in structures, content and

pedagogy, to ensure the relevance of education to the needs of the greatly increased and

variegated school population" (Papadopoulos, 1994, p. 202). Indeed, the topic of the first

major OECD conference on education held in Sweden in 1961 focused on " the major

barriers to the use of potential human ability in education, specifically in terms of social

class, rurality, school organization and cultural inequalities..."(Papadopoulos, 1994, p.

33).

This was also the period in which CERI, funded initially in part by the Ford ·

Foundation and Shell Oil, was formed and became a catalyst for early educational

innovation and reform. Papadopoulos also maintains that there was an important link

between education and the economy but that education was allowed to develop

independently as governments concentrated on meeting the social demand for education.

As a result of "the great divide", that is, the recession of the early 70s, the second epoch, was a departure from the earlier Keynesian period. While the initial epoch was driven by demand, this second epoch, changed by fiscal restraint was driven by supply and eventually led to a market approach in the "funding, organization and behaviour of educational institutions" (Papadopoulos, 1994, p. 202). However, changes such as these are never as uniform or uncontested as they may seem. What is not made explicit within Papdopoulos's version of this 'golden era of growth' is the critical context.

Within the golden initial epoch of education, it was advantageous for education policy to be inclusive by focusing on social and equity concerns. As mentioned in Chapter 2, the major thrusts of Keynesianism were empire building and keeping the threat of Communist expansion in check. Just as new capitalism would later use education to inculcate and subsequently naturalize its neo-liberal prescriptions for a new world order, so too did Keynesianism adopt post war empire building policies.

The second market-based epoch of education was not as uncontested within the OECD as Papadoupoulos' version may imply. Marked by the first Ministerial conference on education in 1978, as well as elevated levels of youth unemployment, the second epoch " placed education firmly within the discourse of human resource development for economic growth" (Henry, Lingard, Rizvi & Taylor, 2001, p.64). However, within the OECD, an economic imperative was not embraced by all of its members.

Henry et al (2001) cite numerous accounts. In particular, the opening address to the 1978 conference conceded that the role of education in reducing inequality may have been exaggerated, but maintained that educational prospects for the poor should be continued. Later, the OECD's indicators project was also met with strong criticism.

However, under threat of leaving the Organization, the United States used jagged persuasion to rally support for indicators.

As the 70s drew to a close, CERI adopted a new mandate to bring education center stage, signaling a tighter policy relationship between education and the economy. By 1989, a decade after the first Ministerial conference, an intergovernmental conference entitled, *Education and the Economy in a Changing Society* set the tone by mirroring human capital beliefs linking education to economic prosperity (Henry, Lingard, Rizvi & Taylor, 2001).

Henry et al (2001) cite Apple's (1992) observations of the 1989 conference. Apple (1992) maintained that what was most consequential was, " the overall orientation of its analysis and its linguistic strategies in creating a rhetoric of justification for a tighter connection between educational systems and world economy." Moreover, general discussions of education were "almost always seen against the backdrop of a crisis in productivity and competition" (p. 127).

By the early 1990s, the new consensus in educational policy, stressing accountability, efficiency and a culture of performativity, was solidly entrenched within the OECD. As an advocate of this new world order, the OECD buttresses the demands of new capitalism while re-defining human capital theory. It is within this context that ideological instruments, such as the Adult Literacy and Life Skills Survey, are embedded. The following chapter will be exploring this further.

Chapter Summary

While chapter 2 concluded with a brief discussion of how globalization and education coalesce, this chapter further refined this inquiry by looking at globalization and literacy. This chapter argued that literacy within the new world order of neo-liberal globalization has become manufactured as a commodity. As cultures of accountability and of performativity have reframed both education and literacy, it became important to quantify and measure literacy.

Instruments, such as the Adult Literacy and Life Skills Survey (ALLS), purported to assess a revised hegemonic form of functional literacy required by the knowledge workers of *new capitalism*. Contesting this perspective, New Literacy Studies (NLS) considers literacy not from the skills based perspective of the dominant functional approach but rather, as a social practice. NLS will play a more significant role in the subsequent chapters, as an analysis of some of the questions from the Adult Literacy and Life Skills Survey will be analyzed from the perspective of discourse analysis, based on the work of Gee (1992,1999) and Fairclough (1989,1992,1995).

Chapter 3 concludes with a discussion about the Organization for Economic Cooperation and Development (OECD), the driving force behind much of Western education as well as literacy policy. It is particularly important to understand how the OECD works and how it formulates policy specifically within the context of "globalization".

Chapter 4

Discourse Analysis

> The rapid rate of technological innovation and the globalization
> of markets have led to high rates of structural adjustments in
> OECD economies. This, in turn, has quickened the pace at which
> disadvantaged individuals have become marginalized. In many cases,
> the very structure of educational systems and the labour market work
> against rapid adjustment and the interests of the marginal workers
> because the systems for signaling skill seek to divide the workforce into
> discrete, non-transferable categories.
>
> Murry,T.S. , Clermont, Y. , Binkley, M. Measuring Adult Literacy and Life Skills p.16

> When we speak or write we always take a particular *perspective* on what
> the "world" is like.... What is normal and not; what is acceptable and not;
> what is right and not; what is real and not... what people like us or people
> like them do and don't do and so on... these are all perspectives on how we
> believe, wish, or act as to how potential social goods are, or ought to be,
> distributed... Politics has its lifeblood in such details.
>
> Gee, J.P. Discourse Analysis. p.2

The focus of this thesis thus far has been to construct an argument that attempts to

de-naturalize the dominant ideological stance of both literacy and globalization. Perhaps

no phenomena other than literacy and globalization have approached the status of *cause*

célèbre in the latter part of the 20th century and early 21st century. Both terms have

peppered print and visual media and have been the subject of electoral rhetoric, public

policy and educational reforms as artifacts pivotal to success. Yet, neither term is

interrogated outside academia.

The dominant, naturalized perspective of globalization is commonly depicted as a

means of describing worldwide economic trends and as a metaphor for a borderless world

that has become fetishized as the gateway to modernity, promising opportunity for

growth and prosperity. As a force, it is presented as "irresistible, inevitable and inescapable" (Veltmeyer, 2005), and thusly, remains uncontested.

Within this uncontested landscape of globalization, literacy is "traditionally defined as the ability to read and write in page-bound, official standard forms and *more often than not*, in the official language" (Cazden, Cope, Fairclough et al, 1996). The problem with this perspective is that it positions literacy as a universal and neutral construct that obscures the cultural and ideological assumptions that are behind it, as well as the complexity of the problems that literacy purports to alleviate. Questions such as whose literacy and for what purpose(s) are not readily considered. For these reasons, the mainstream model of functional literacy has been critiqued by Street (1984, 2001, 2005) and renamed the autonomous model.

The autonomous model "works from the assumption that literacy in itself-autonomously-will have effects on other social and cognitive practices" (Street, 2005p 417). The assumption is that literacy in and of itself will lead to economic prosperity, an increase in social justice and better social conditions. Reflected in UNESCO's social policy as well as the United Nations' overarching Millennium Goals, "Literacy is important because it is the key to the toolbox that contains empowerment, a better livelihood, smaller and healthier families, and participation in democratic life" (UNESCO, 2002).

As well-intentioned and convincing as these goals may appear, literacy is portrayed as a universal concept, as a set of competencies or technical skills to be imparted to those who are lacking them. That is, literacy is not seen as a *contested space* (Street, unpublished, p. 76). Questions such as, "whose literacy", "at what cost", "for

what purpose", and "why and how does one measure literacy" are not readily evoked because the ideological and cultural assumptions that buttress this perspective remain invisible.

Chapter 3 considered literacy within the context of globalization and proposed that literacy within the new world order of neo-liberal globalization had become manufactured as a commodity. Fear of falling educational standards permeated the rhetoric of politics and media effecting policy and education reform within OECD member countries and beyond. As the neo-liberal goals of accountability and of performativity reframed both education and literacy, it became ideologically strategic for governments to quantify and measure literacy. Instruments, such as the Adult Literacy and Life Skills Survey (ALLS), were created in alliance with the OECD, to address the fears that the purported downward spiral of falling standards of education and literacy would result in an inability to competitively survive within the global marketplace and of being overtaken economically by other countries.

Within this global economic framework, a revised hegemonic form of functional literacy has become the latest unquestioned benchmark required by the knowledge workers of *new capitalism*. Questions such as, "whose literacy?"; "at what cost?"; "for what purpose?" and "in what context?", that probe the social and ideological underpinnings of this naturalized shield, are not considered. Research from the New Literacy Studies (NLS) approach maintains that rather than adopting a single, overriding and consequently, dominant definition of literacy, it is more valid to speak of multiple literacies. The salient question then, to borrow a phrase, remains, "Where to begin?" (Lenin, 1961).

The focus of this chapter then is an attempt to critique the perspective that is represented by the Adult Literacy and Life Skills Survey (ALLS). The approach that will be used has been influenced by critical discourse analysis based on the theoretical works of Gee (1992,1999) and Fairclough (1989,1992,1995).

Discourse Analysis

Before discussing critical discourse analysis, it is important to clarify the meaning of discourse analysis. As with both literacy and globalization, the term discourse analysis is also contested (Blommaert, 2005; Weiss and Wodak, 2003; Wodak and Meyer, 2001). Indeed, Richardson (2007) maintains that the terms 'discourse' and 'discourse analysis' are so vehemently questioned that they may be the most frayed words in academia. In the most general non-contextualized form, *discourse* can refer to reflections on oral or written texts. Fairclough (1992, p. 3) elaborates.

> In linguistics, 'discourse is sometimes used to refer to extended samples of
>
> spoken dialogue, in contrast with written 'texts'. More commonly, however,
>
> 'discourse' is used in linguistics to refer to extended samples of either spoken or
>
> written language.

In an attempt to sift through the substantial and at time confusing debates enveloping 'discourse', Schiffrin (as cited in Richardson, 2007) has summarized two major approaches in defining this term: the formalist/structuralist approach and the functionalist approach.

The Formalist/Structuralist Approach

The formalist/structuralist perspective defines discourse as a particular unit of language "above' the sentence. That is, a perspective that focuses on the formal features that link two sentences together to form a discourse. When analyzing two grammatical units, such as, sentences, theorists who adhere to a formalist/structuralist approach look for four features: cohesion, narrative, causality and motivation of meaning (Cameron, 2001).

The following can serve as an example:

The cat meowed.

The girl fed it.

Cohesion is determined when a word or phrase in one sentence is linked to another sentence. For example, the noun, **cat**, in sentence 1 is replaced by the pronoun, **it**, in sentence 2. Secondly, the two sentences are evaluated in terms of their *narrative* relationship. Evaluating the discourse relationship at this point, requires an assessment of whether the presumed relation between the two units establishes a commonsense relationship. After reading the two sentences, the customary assumption is that the two events were related; the cat meowed and the girl assumed that it was hungry and fed it. There is nothing in these two sentences that would contradict other interpretations, however, a *causal* relationship that draws from a cultural, social, historical schema is inferred: <u>Because</u> the cat meowed, the girl fed it. More often than not, other more

elaborate assumptions are inferred extending causality to *motivation*. For example,

drawing on the above example, the cat is believed to belong to the girl even though the

possessive pronoun "her" is not stated.

What can be extracted from this discussion is that the reader, in order to make

sense of the information given, infers meaning. Herein, lies a major weakness with the

formalist approach to discourse; it underestimates the role of the social in the use and

interpretation of language. This emphasis is not overlooked by the functionalist approach

that maintains language should be studied as 'language in use' (Gee, 1992,1999).

The Functionalist Approach

The functionalist approach to discourse analysis assumes that language is active

and that discourse analysis is the analysis of what people do with language. Discourse is a

dialogic relationship between language and society simultaneously reflecting reality and

constructing it in a certain way (Gee, 1999). Language then represents and contributes to

the production and reproduction of social reality. As Fairclough (1995, p. 17) explains,

"discourse analysis can be understood as an attempt to show systematic links between

texts, discourse practices and sociocultural practices".

For Fairclough (1989,1992, 1995), *discourse practices* refer to the production,

dissemination and consumption of texts while *sociocultural practices* are subdivided into

'situational', 'institutional' and 'societal' levels- "the specific goings –on that the

discourse is part of, the institutional framework(s) that the discourse occurs within, and

the wider social matrix of the discourse" (Fairclough, 1995, 17).

What distinguishes "critical" discourse analysis from discourse analysis is the study of power and the social relations engendered through it. Embedded in the Frankfurt School (Blommaert, & Bulcaen, 2005) of critical theory, it is a rejection of naturalism, neutrality, rationality and individualism. Hence, it is a rejection of the beliefs that social practices and labels reflect reality, that "truth" is derived from science and logic, and is value free. In contrast, the intentions of critical discourse analysis are most certainly not neutral. What follows is a discussion of critical discourse analysis in general, followed by a discussion of the specific approaches adopted by both Gee (1992,1999) as well as, Fairclough (1989,1992,1995).

Critical Discourse Analysis

Critical discourse analysis germinated in the late 1970s out of the research of a group of linguists from the University of East Anglia. Pronouncing a definitive critical left wing perspective, European discourse studies focused on the use of language in social institutions, as well as the relationship between language, power and ideology (Wodak, as cited in Verschueren, Östman & Blommaert, 1995) and signaled a significant departure from Chomskian linguistics as well as sociolinguistics. Neither Chomkian linguistics nor sociolinguistics placed much emphasis on the interconnection between language and power in social relationships. While the former focused on formal aspects of language with emphasis placed on linguistic competence and units of sentence structure, the latter emphasized the variation and change of language as well as the structure of interaction.

Drawing from the systemic functional and social semiotic linguistics of Michael

Halliday (Blommaert, 2005), Critical Discourse Analysis signaled a major shift that

focused on the production, distribution and interpretation of language/discourse, noting

that language, in and of itself, was not powerful but rather became dominant through the

use that powerful people made of it. The epicenter of critical discourse analysis research

has been associated with the works of Fairclough, Van Dijk and Wodak as well as

various other associated approaches such as systemic functional linguistics, social

semiotics, political discourse analysis and discursive social psychology (Blommaert &

Bulcaen, 2000).

The roster of contributors has been described and critiqued as being decidedly

'selective' in that few references have been made to research conducted in American

linguistics and linguistic anthropology. Interestingly, the exception to this exclusion is the

research conducted in the area of literacy and critical discourse analysis. Viewing literacy

as "situated practice", New Literacy Studies includes the works of Heath (1983), Street

(1995), Barton and Hamilton (1998), Cope and Kalantzis (2000) as well as others.

Perhaps, as van Dijk (2001) suggests, it is more appropriate to begin by

considering what Critical Discourse Analysis is not. Firstly, CDA is not a distinct method

or a theory that can be applied to the analysis of social problems. CDA has never been

one specific theory and as such cannot be viewed as a holistic paradigm (Wodak, 2006).

Rather, it is eclectic in its perspective, as it can be combined with other social science

approaches. Critical discourse analysis is considered a research procedure or a school of

thought. Moreover, any reference to critical discourse analysis must also make reference

to the particular researcher. Some of the tenets of CDA that are supported by most who

adhere to the research program of CDA are summarized as follows (Fairclough &

Wodak, 1997 p. 258):

> CDA sees discourse- language use in speech and writing- as a form of 'social
>
> practice'. Describing discourse as a social practice implies a dialectical relationship
>
> between a particular discursive event and the situation(s), institution(s), and social
>
> structure(s), which frame it: The discursive event is shaped by them, but it also
>
> shapes them. That is, discourse is socially constitutive as well as socially
>
> conditioned...It is constitutive both in the sense that it helps to sustain and
>
> reproduce the social status quo, and in the sense that it contributes to transforming
>
> it. Since discourse is so socially consequential, it gives rise to important issues of
>
> power. Discursive practices may have major ideological effects- that is, they can
>
> help produce and reproduce unequal power relations between (for instance) social
>
> classes, women and men, and ethnic/cultural minorities through the ways in which
>
> they represent things and position people.

Critical Discourse Analysis then focuses on the role of discourse in the production

and reproduction of domination and power relationships; it takes the perspective of the

dominated group(s); and it supports that groups struggle with inequality. As Gee's (1999,

p. 2) epigraph at the beginning of this chapter states, " politics has its life blood in these

details". As such, the focus of much Critical Discourse Analysis is the investigation of

ideologically biased discourses and how these discourses engender a dominant,

naturalized belief system. Hence, CDA has an overtly biased political perspective that has

earned it a reputation as being critical scholarship 'with an attitude' (van Dijk, 2001 p. 96).

The major tenets of Critical Discourse Analysis have been summarized by Titscher, Meyer, Wodak and Vetter (2000) by drawing upon the works of Wodak (1996). They are as follows:

- Critical Discourse Analysis is concerned with social problems. It is not concerned with language or language use *per se,* but with the linguistic character of social and cultural processes and structures.

- Power-relations have to do with discourse, and Critical Discourse Analysis studies both power in discourse and power over discourse.

- Society and culture are dialectically related to discourse, and at the same time constitute discourse. Every single instance of language use reproduces or transforms society and culture, including power relations.

- Language use may be ideological. To determine this it is necessary to analyze texts to investigate their interpretation, reception and social effects.

- Discourses are historical and can only be understood in relation to their context....

- Discourse analysis is interpretative and explanatory. Critical analysis implies a systematic methodology and a relationship between the text and its social conditions, ideologies and power-relations. [...] (Wodak, 1996:17-20, cited in Titscher *et al.,* 2000: 146)

Gee's Approach

Discourse, according to Gee (1999), is very much like an "identity kit" replete with the wardrobe and handbook necessary to adopt a particular role that will be recognized by others. When one is trained or initiated into a particular role, one learns to speak, act, think and acknowledge others who bear the same identity. This is further complicated as within a particular discourse various other sub-discourses also exist. Gee (1999) elaborates by drawing on the example of the discourse of being a linguist where every action of speaking, behaving and writing as a linguist is meaningful only within the social context of that identity which in turn is buttressed by institutional affiliations, rules of publishing, values, norms and shared history.

Gee (1999, p. 1) maintains that the primary functions of language are to "scaffold the performance of social activities and to support human affiliation within cultures, social groups and institutions". Language, according to Gee, mediates the individual/mind and the social/society. The individual/mind is nourished through interaction with the physical and social and is expressed through language. Language in turn mirrors the physical and social order, further molding and constituting how the physical and social are used. Hence, language in use is the fusion of mind and society. These two functions are connected as cultures, social groups and institutions shape social activities while simultaneously, cultures, social groups and institutions are produced, reproduced and transmitted through human activities.

Gee's (1992, 1999) approach makes a distinction between big D and little d discourses. While 'd'iscourse refers to what linguists mean by 'language in use",

'D'iscourse is a result of the multiple relationships between little d "language in use"

discourse fused with non-language ways of "thinking, acting, interacting, valuing,

feeling, believing, and using symbols, tools and objects in the right places and at the right

times... to give the material world certain meanings and to privilege certain symbol

systems and ways of knowing over others."(Gee, 1999 p.13). Gee (2004, as quoted in

Rogers, 2004 p. 48) summarizes the basic premise of discourse analysis as follows:

How people say (or write) things (i.e., form) help constitute *what* they are doing

(i.e., function). In turn, *what* they are saying (or writing) helps constitute *who* they

are being at a given time and place within a given set of social practices (i.e., their

socially situated identities). Finally, *who* they are being at a given time and place

within a given set of social practices, produces and reproduces, moment by

moment, our social, political, cultural and institutional worlds.

Gee (1999) further elaborates that discourse analysis of any type can engage in

either or both *utterance-type meaning* tasks or *utterance-token meaning* tasks. The

former refers to the relationship between form and function where form refers to

linguistic units such as morphemes, words, phrases and function refers to the meaning

that a form conveys. *Utterance-token meaning*, on the other hand, refers to situated

meaning.

What distinguishes critical discourse analysis from other forms of discourse

analysis is that critical discourse analysis stipulates that "language in use" is part of social

practice that is fundamentally political, as through its status, the distribution and

exclusivity of social goods, as well as, power are always negotiated. What follows is a discussion of Fairclough's (1992,1995) critical discourse analysis (CDA) approach.

Fairclough's Approach

The aim of Fairclough's version of critical discourse analysis (CDA) is to blend "linguistically-oriented discourse analysis and social and political thought relevant to discourse and language, in the form of a framework which will be suitable for use in social science research, and specifically in the study of social change" (Fairclough, 1992 p.62). Fairclough regards language not only as representation but as how the theorists of New Literacy Studies view literacy, as a form of social practice, a way that people act upon the world and in turn, are acted upon, creating a dialectical relationship between discourse and social structure.

> ...discourse is shaped and constrained by social structure in the widest sense and
> at all levels: by class and other social relations at a societal level, by the relations
> specific to particular institutions such as law and education, by systems of
> classification, by various norms and conventions of both a discursive and non-
> discursive nature...(64)

Discursive practice reproduces social identities and systems of knowledge and beliefs but also, for Fairclough, has the ability to be transformative in that, discourse as a mode of

political practice and of ideological practice can both perpetuate as well as transfigure power relations.

Fairclough outlines a three dimensional framework for analyzing discourse which include the following: *discourse as text, discourse as discursive practice* and *discourse as social practice*. The term text, for Fairclough, is used to refer to any product, either written or spoken but also includes other symbolic forms such as visual images that combine words and images (Hodge and Kress, 1988).

The first dimension, *discourse as text*, focuses upon the language analysis of a text. This level of analysis is concerned with the choices and patterns of vocabulary, grammar, cohesion of the text, as well as, text structure. Viewed as an ascending scale for Fairclough, vocabulary refers to the choice of specific words as well as the use of alternate wording. An example of alternate wording can be drawn from the analysis of word pairings within news rhetoric (Richardson, 2007).

In Western mainstream reporting on the war in Iraq, western allies launch "first strikes" and "pre-emptive attacks" while the 'other/enemy' launches "sneak attacks" and "attacks without provocation". As well, words can also become an area of contention within a wider struggle. An example of this is the word concept "communities of practice'. The original meaning described a collective learning experience and has since been "borrowed" by the rhetoric of new capitalism (Gee, Hull & Lankshear, 1996).

Grammar analysis in turn looks for units of meaning within the text such as clauses, simple or complex sentences. In this instance, issues of syntax and transitivity are analyzed. Transitivity refers to the action that takes place within a sentence- who (noun phrase) does what (verb phrase) to whom (adverbial or prepositional phrases). An

example of when the transitive action within a sentence is changed is when the agent is removed by use of the passive voice. While text structure analyses dialogue and turn taking, cohesion studies how clauses are linked together within a sentence and how sentences are built to form paragraphs. As well, cohesion addresses rhetorical schemata. That is, how groups of statements are combined to create a particular structure or style.

The second dimension, *discourse as discursive practice,* is concerned with production, distribution and consumption of texts within particular social contexts. Included in this category are the following three elements that link a text to context: force of utterances, coherence of text and intertextuality. Force of utterance refers to part of a text that is performative i.e., gives, takes, admonishes, promises while coherence of text refers to how a text as a whole stands, is logical and communicates an idea clearly. Fairclough (1992, P. 84) makes the salient point:

> ...a text only makes sense to someone who makes sense of it, someone who is able to infer those meaningful relations in the absence of explicit markers. But the particular way in which a coherent reading is generated for a text depends upon the nature of the interpretive principles that are being drawn upon. Particular interpretive principles come to be associated in a naturalized way with particular discourse types, and such linkages are worth investigating for the light they shed on the important ideological functions...

Intertextuality refers to the analysis of texts from a historical perspective by noting the presence of conventions as well as the inclusion of parts of earlier texts into

the text under analysis. Fairclough outlines two forms of intertextualiy, manifest and

constitutive. An analysis of manifest intertextuality draws upon the excepts of other texts

which are present in the principal text, for example, the use of direct quotes. Constitutive

intertextuality, texts that are comprised of segements, such as conventions and style that

may not be as obvious to the reader/viewer as manifest intertextuality. Essentially,

intertextuality analyzes the concept of authorship. Fairclough elaborates (1992, p. 105):

> Intertextuality is the source of much of the ambivalence of texts. If the surface of
>
> a text may be multiply determined by the various other texts which go into its
>
> composition, then elements of that textual surface may not be clearly placed in
>
> relation to the text's intertextual network, and their meaning may coexist, and it
>
> may not be possible to determine 'the' meaning.

The third dimension of discourse analysis, *discourse as social practice*, is

concerned with discourse in relation to ideology and power. Power in this context is

expressed as hegemony, power that is achieved through alliances that are integrated

through consent and how ideology within this context becomes naturalized. Fairclough

(1992, p. 87) elaborates: "The ideologies embedded in discursive practices are most

effective when they become naturalized, and achieve the status of common sense..."

Chapter Summary

After introducing the idea of discourse analysis, this chapter then focused on

critical discourse analysis by looking at the approaches of Gee and Fairclough. The focus

of the subsequent chapter, Chapter 5, will be to apply aspects of critical discourse

analysis to items from the Adult Literacy and Life Skills Survey (ALLS). The items from

the Adult Literacy and Life Skills Survey (ALLS) that will be analyze have been selected

from the available "sample items" of the ALLS, published by the National Center for

Education (NCES) Statistics and have been documented on their website:

http://nces.ed.gov/surveys/all. As these "sample items' were among those pre-selected for

the public by the NCES, they will be considered as an ethnographic document or as what

Gee (1988) has referred to as a "found text".

Limitations

Due to limitations of space, two questions, one designated as measuring literacy

skills, the other measuring numeracy skills, have been selected. These two "sample"

questions will be analyzed from the perspective of critical discourse analysis with a

caveat, as this analysis is that of a novitiate with little formal training in either linguistics

or rhetoric. As such, it is an exercise that will provide an introduction to critical discourse

analysis that can be applied to future research.

There is a further caveat. This chapter has offered a preliminary glimpse into

discourse analysis as well as to the ideas of Gee and Fairclough and does not claim to

definitively represent these ideas. Moreover, tools of analysis such as *intertextuality* are

far more complex than this chapter's portrayal. As such, this chapter should be

considered as an introductory exercise, one that can be built upon as well as contested

through future research.

Chapter 5

The Adult Literacy and Life Skills Survey:

Analysis

In a report produced by the National Center for Educational Statistics (2005), the Adult Literacy and Life Skills Survey (ALL), first conducted in 2003, was described as an international project, the purpose of which was to provide participating countries with information about the literacy and numeracy skills of a cross section of their adult population ranging in age from 16 to 66. The countries that participated during this phase were Bermuda, Canada, Italy, Norway, Switzerland and the United States.

The Adult Literacy and Life Skills Survey (ALL) was and continues to be a large-scale co-operative effort undertaken by governments, national statistics agencies, research institutions and multi-lateral agencies. The development and management of the study were coordinated by Statistics Canada and the Educational Testing Service (ETS) in collaboration with the National Center for Education Statistics (NCES) of the United States Department of Education, the Organization for Economic Co-operation and Development (OECD), the Regional Office for Latin America and the Caribbean (OREALC), and the Institute for Statistics (UIS) of the United Nations Educational, Scientific and Cultural Organization (UNESCO).

Building upon the earlier International Adult Literacy Survey (IALS), both seek to measure literacy by means of the survey and to produce international comparisons. UNESCO initially launched this convention (Jones, 1990) soon to be followed by the IALS and then the ALLS. Both the IALS and the ALLS were organized

by the Organization for Economic Co-operation and Development (OECD) in association with Canadian and American national statistical agencies. As Barton and Hamilton (2000, p. 378) maintain, " such research is driven by the search for universals in the relationship between literacy, education and prosperity which can be used to further the goal of global development". Moreover, as these studies were sponsored by and targeted for international policy-makers, they are powerful ideological tools, determining how literacy is portrayed and what literacy programmes will be funded globally.

Literacy as Skill

In a recent document published by Statistics Canada and the OECD (Murray, Owen & McGaw, 2005) entitled, *Learning A Living,* literacy is portrayed as a set of information processing skills that places emphasis on reading. Four skill domains are conceptualized in the ALLS along a *continuum of proficiency*. They are as follows: prose literacy, document literacy, numeracy and problem solving. Responses to questions in each domain were rated on a scale ranging from 0 to 500 points. For each domain, various "experts" designated various levels of difficulty. For example, Prose, Document and Numeracy skill domains have been designated five levels of difficulty while Problem Solving has been assigned four levels. The definition of skill within the ALLS is as follows (Murray, Owen & McGaw, 2005 p. 15):

There is no arbitrary standard distinguishing adults who have or do not have skills. For example, many previous studies have distinguished between adults who are either "literate" or "illiterate". Instead, the ALL study conceptualizes proficiency

along a continuum and this is used to denote how well adults use information to function in society and the economy.

While this study attempts to measure literacy across four scales, acknowledging its complexity, it still views literacy as a set of cognitive information processing skills and believes that it can be quantified. So influential is this methodological paradigm that for many there is no other choice in how to proceed. Barton and Hamilton (2000, p. 379) restate the dilemma:

> When evaluating a study of this kind, we can accept the methodological paradigm within which it works and critique it in terms of its own logic and aims... We can also look at what can be achieved with this kind of methodology in relation to other possible approaches... using an approach which sets out from a different point- starting from the local, everyday experience of literacy in particular communities of practice. Our approach (New Literacy Studies) is based upon the belief that literacy only has meaning within its particular context of social practice and does not transfer unproblematically across contexts...

From this view of literacies, earlier criticisms of the AILS can also be waged upon the ALLS. As such, the ALLS portrays a partial view of literacy, biases culture and test items which claim to reflect real life do not (Barton &Hamilton, 2000). What follows is a presentation and critical discussion of two of the items included within the Adult Literacy and Life Skills Survey (ALLS).

How ALLS Measures Literacy

The ALLS Prose Literacy scale consists of 55 questions, ranging in difficulty from 169 to 439, ordered along a 500-point scale. Questions were subsequently sub divided into levels of difficulty. Difficulty is defined by ALLS (Murray, Owen & McGaw, 2005 p.284) as:

> ... the extent to which information in the text shares one or more features with the information requested in the question but does not fully satisfy what has been requested. Tasks are judged to be easiest when no distractor information is present in the text. They tend to become more difficult as the number of distractors increases...Tasks are judged to be most difficult when two or more distractors share most of the features with the correct response and appear in the same paragraph or node of information as the correct response.

Items within the Prose Literacy ALLS scale were evaluated as being more difficult depending upon the level of inference needed to obtain the correct answer. Moreover, higher levels of difficulty were also associated with a reader extracting information and composing an answer in their own words. For example, a Level 4 task requests that the reader use the information from a text about employment interviews and to then write in their own words one difference between the two types of interviews featured in the question, the panel or the group interview. Level of difficulty in this instance is evaluated as greater because in addition to two pieces of information being located within the text, the information must be further integrated to infer the differences between the two types of interviews The ALLS document, *Learning a Living* (2005, p. 286), further

elaborates:

> Experience from other surveys of this kind reveal that tasks in which
>
> readers are asked to contrast information are more difficult, on
>
> average, than tasks in which they are asked to find similarities. Thus, type of
>
> match was scored as complex and difficult. Type of information was scored as
>
> being difficult as well because it directs the reader to provide a difference.
>
> Differences tend to be more abstract in that they ask for the identification of
>
> distinctive or contrastive features related in this case to an interview process.

Items identified as falling within the range of Level 3 difficulty required a reader to solve a complex problem from a bicycle's owner manual to ensure that the seat was positioned properly. Several conditions were presented within the text and the reader had to determine which two conditions should be selected to solve the problem. The number of conditions to be selected was not indicated in the actual question.

Items, evaluated as Level 2 difficulty, required a reader to locate information within a selected text but to identify a particular condition. For example, details were given about the stem and leaves of an impatiens plant and the reader was required to infer that this was a type of plant that required much water.

The "Aspirin Bottle Label" item was evaluated as Level 1 on the difficulty scale by the ALLS, signifying that it was judged as one of the easiest tasks. In this task, the reader is asked to read the featured medicine label and determine "the maximum number of days you should take this medicine". This item was evaluated as a basic level literacy question as the reader could obtain the answer directly because it was located under the heading of *dosage oral*.

The assumption behind including this type of "everyday" test item in the ALLS was

that if a large number of readers had difficulty answering a Level One question, not only was their economic well being threatened but their health and perhaps that of their loved ones was also endangered by "illiteracy". The next section questions this conclusion.

An Alternative Perspective - New Literacy Studies

From the perspective of New Literacy Studies, where literacy draws meaning from its own social practice, the quantitative parameters of the ALLS provides only a partial picture of literacy. However, the hegemonic claim of surveys such as the ALLS maintain that their results are representative of literacy in its entirety. The definition of literacy given in the ALLS' policy document *Learning a Living*, attempts to acknowledge the complexity of literacy by considering four separate dimensions of literacy based primarily on reading. However, as Gee (1988, p. 37) explains, there is a fundamental paradox in this concept of literacy.

> ...one has to either define literacy quite narrowly as the "ability to decode (and encode) writing" or one has to define it in such a way that reading and writing do not play a privileged role in the definition. If we demand in our view of literacy that people understand what they read, then we perforce include in our view of literacy the interpretation people give to the text. But this interpretation is always done in terms of some discourse system. And this discourse system will hardly ever be one that is restricted to use with written language. Rather, it will be used to encode and decode oral language and events in the real world as well.

Gee (1988) further explains that all discourse systems have referential, contextualized and ideological levels or "systems" in the language planning process. The referential is concerned with literal meaning, the contextualized with social relations while ideology is concerned with values, beliefs and worldview. Any combination, and therein, any configuration of the referential, contextual and ideological systems constitute a discourse system. Moreover, at least one principal (primary) discourse system is inherited through primary socialization within the family and "secondary" discourse systems are acquired as we become socialized within social institutions other than the family.

From this perspective, when surveys such as the ALLS and AILS purport to define and measure all literacy and subsequently compare these findings internationally, one can begin to question how these results reflect " real life" as they claim. Gee (1988) and other theorists from the New Literacy Studies perspective (Gee, 1990; Street, 1996; Barton and Hamilton, 2000) argue, the "simple" task of reading and answering questions on literacy surveys such as the *aspirin bottle label* is much more complicated than the ALLS methodological and ideological perspective acknowledges. Moreover, as Barton and Hamilton (2000, p. 382) argue, international comparisons require the standardization of assumptions making culture a distracting variable.

> Within this tradition it is commonsense that any literacy practice not recognized beyond a particular cultural group cannot be used to generate test items for across-cultural study since this would constitute cultural bias...from the new literacy studies perspective, the search for cultural neutrality directs attention

away from the features that are most essential for an understanding of literacy and its dynamic within every day life.

Moreover, when texts are removed from their cultural and social contexts and then manufactured as test items within the ALLS, any semblance of the "everyday" is transformed into quantifiable test items. The corresponding levels of "difficulty" are the product of a statistical narrative that claims to represent reality. However, the rhetoric of ALLS policy documents, promotes a revised hegemonic form of universal functional literacy required by the knowledge workers of *new capitalism.*

As with other areas of the public sector such as health and education, literacy is being remade to buttress the perceived runaway demands of global capitalism. Policy documents and media coverage persistently reinforce the fear that nations are falling behind market expectations of performance. Further exacerbating this fear, perhaps one of the more sobering dyads of twenty first century consternation is that of health care and financial maintenance. What follows is a brief analysis of two of the survey items that mirror these areas.

The Aspirin Label Revisited

As mentioned previously, the aspirin label question of the ALLS has been evaluated as Level 1 on the difficulty scale by the ALLS, signifying that it was judged as one of the easiest tasks. In this task, the reader is asked to look at the following (Figure 1) medicine label and determine "the maximum number of days you should take this

medicine". This item was evaluated as a basic level literacy question as the reader was

asked to retrieve one piece of information that was explicitly mentioned in the text. The

"*plausability of distractors*" within the "Aspirin Label" item was rated by the ALLS

scale as "easy", as there were no further competing units of information that could detract

from the answer. Further, the answer could be obtained directly as it was located under

the heading of *dosage oral*. From the perspective of new literacy studies and discourse

analysis this task is not as uncomplicated as the ALLS maintains.

MEDCO ASPIRIN   500

INDICATIONS: Headaches, muscle pains, rheumatic pains, tooth-aches, earaches. RELIEVES COMMON COLD SYMPTOMS.

DOSAGE: ORAL. 1 or 2 tablets every 6 hours, preferably accompa-nied by food, for not longer than 7 days. Store in a cool, dry place.

CAUTION: Do not use for gastritis or peptic ulcer. Do not use if taking anticoagulant drugs. Do not use for serious liver illness or bronchial asthma. If taken in large doses and for an extended period, may cause harm to kidneys. Before using this medication for chicken pox or influenza in children, consult with a doctor about Reyes Syndrome, a rare but serious illness. During lactation and pregnancy, consult with a doctor before using this product, especially in the last trimester of pregnancy. If symptoms persist, or in case of an accidental overdose, consult a doctor. Keep out of reach of children.

INGREDIENTS: Each tablet contains 500 mg acetylsalicicylic acid.
Excipient c.b.p.   1 tablet.
Reg. No. 88246

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1800 Industrial Blvd, Montreal, Quebec H9J 3P1

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Figure 1. Adult Literacy and Life Skills Survey: The aspirin bottle label

From a referential perspective each of the following headings- *indications,*

dosage oral, caution and ingredients- structure the text in a rhetorical schemata that

privileges scientific medical discourse. Terminology such as Reye's Syndrome, bronchial

asthma, anticoagulant drugs, influenza and lactation further reinforce this discourse choice. As mentioned previously in this chapter, Fairclough argues (1994, p. 85) that

> a text only makes sense to someone who makes sense of it, someone who is able
> to infer those meaningful relations in the absence of explicit markers. But the
> particular way in which a coherent reading is generated for a text depends upon
> the nature of the interpretive principles that are being drawn upon. Particular
> interpretive principles come to be associated in a naturalized way with particular
> discourse types ...

Moreover, within the *caution* section of the text, the cohesive style creates a rhetorical schemata that privileges legal discourse. The list of imperative statements within the *caution* segment of the text removes all sense of agency. The force of utterance of that part of the text seems to admonish a phantom reader for actions that may possibly be considered but have not yet been committed.

Such referential strategies are deliberately chosen by its author to perform a particular function by projecting meaning and social values on what or to whom the text refers. As Gee (1988) suggests, texts such as these are written for those who already have sufficient medical and legal knowledge that they can understand what is written. That is, those who are members or related participants of that particular situated 'D'iscourse.

Moreover, much of the information on the label warns the reader about a series of seemingly unrelated events. Statements such as, *in case of an accidental overdose, consult a doctor*, are further confusing. Should the reader assume that if the overdose was

not accidental, a doctor should not be consulted? Moreover, should a doctor be consulted if nine aspirins were taken in one day (Gee, 1988)? Given its contextualization and ideological devices, the text reads more like a legal insurance policy protecting a pharmaceutical company against possible legal action should a medical problem occur.

Drawing from the statistical rhetoric employed by the ALLS, the phrase *plausibility of distractors* holds little meaning when one views literacy as social practice. As a statistical metaphor, this phrase lends authority to a policy text and eliminates all sense of agency inferring an objective quantifiable "truth". The following ALLS item further explores the assumption that numbers are universal, value free and above culture.

How ALLS Defines Numeracy

Seeking to define numeracy in a more comprehensive way from the earlier AILS treatment of numeracy as quantification, the current ALLS defines numeracy as "the knowledge and skills required to effectively manage and respond to the mathematical demands of diverse situations" (Murray, Owen & McGaw, 2005, p. 290). In addition, the ALLS' 2005 policy document, *Learning a Living* appears to be more inclusive in its consideration of numeracy.

The ALLS appears to acknowledge the embedded nature of numeracy in everyday life by stating that a universal definition of "numeracy" does not exist" (Baker and Street, 1994 in Murray, Owen and McGaw, 2005). Moreover, the ALLS alludes to critical numeracy's claim that numeracy is "more than being able to manipulate numbers or even being able to 'succeed' in school or university mathematics" (Johnston, 1994 in Murray,

Owen & McGaw, 2005 p. 294). However, as no reference is made to either critical numeracy or New Literacy Studies in an earlier "benchmark" document (Statistics Canada, 2003), it would seem that the subsequent reference is merely paying lip service to numeracy as social practice.

While the "inclusive" definition may be an acknowledgement of the multidimensional fabric of numeracy, the market driven goals of the ALLS should not be overlooked. The overriding tenor of the ALLS can be extracted from the following policy statement (Statistics Canada, 2003 p.3):

> Given the increasing need for adults to continuously adapt to changing citizenship, workplace, and everyday life demands, it is vital that nations have information about their workers' and citizens' numeracy in order to evaluate the human capital available for advancement, to plan effective school-based and lifelong learning opportunities, and to better understand the factors that affect citizens' ability to advance their well-being.

The economic project of human capital advancement, spearheaded by agencies such as the OECD and the World Bank, promotes the application of market principles to resolve social difficulties and measures the value of education by its contribution to economic growth. As a result, it would seem likely that the OECD sponsored ALLS would focus squarely upon the global market place rather than the social practice of literacy and numeracy. Indeed, the ALLS is more concerned with identifying and quantifying "core skills" or "key competencies".

How the ALLS Measures Numeracy

The ALLS numeracy scale consists of 40 questions, ranging in difficulty from 174 to 380, ordered along a 500-point scale. Questions were subsequently sub divided into levels of difficulty (Murray, Owen & McGaw, 2005, p.17).

Level 1 required tasks that required basic one step numerical operations such as counting, sorting and understanding simple percentages. The task considered the least difficult required the reader to look at a photograph representing of two "full cases" of Coke stacked one atop the other. The reader was instructed that each case contained full bottles and they were then asked to determine the total number of bottles. Conjecture was required in this task, as a portion of the bottom case was obscured. An assumption made by the ALLS as to the low level of rated difficulty of this item, was that if the image was of a common everyday object, it would be familiar. Secondly, as no text was included with the image, the task was "apparent and explicit".

Tasks rated a Level 2 in difficulty required basic math understanding "embedded in a range of familiar contexts". These tasks typically required one or two steps and the interpretation of a simple graphical or spatial representation. An example of a Level 2 task is the gas (petrol) gauge. The gauge has three lines (ticks) on it with one indicating "F" for a full tank; "E" for an empty tank and the third tick is situated between the two. A fourth line, representing the gauge's needle is positioned between the middle tick and the F (full) tick.

The reader is informed that the tank holds 48 gallons and is then instructed to determine approximately "how many gallons remain in the tank". Once more the AIIs maintains that this task id drawn from an everyday item and requires the reader to make a calculation to determine the approximate answer but does not include any additional text or numbers. Hence, the *plausibility of distractors* is considered low. This task is considered more difficult than the previous level 1 example as the reader is asked to calculate the number of gallon that would constitute a half tank and the estimate the answer to the task question.

Some of the tasks rated as Level 3 in difficulty were created in relation to a short newspaper article (Is Breast Milk Safe?) that discussed the relationship between food safety and environmental toxin. The task required the reader to study the two paragraph article as well as the bar graph representing the amount of Dioxin found in breast milk (that was progressively reduced) over a three year period: 1975, 1985 and 1995. The task question asked the reader to describe how the amount of Dioxin had changed from 1975 to 1995. No calculations were required. Rather, a word description (decreased, increased or stayed the same) was requested.

Tasks rated as Level 4 in difficulty required a broad range of abstract mathematical information where texts of increasing difficulty were consulted and multiple steps were required to obtain the answer. Tasks could also require working with formulas or proportions and providing explanations to justify the obtained answers. An example of a Level 4 task drew from the text mentioned in Task 3. In this task, readers were asked to compare the percent of change in Dioxin levels between 1975 to 1985 to

the percent of change in Dioxin level from 1985 to 1995. This task was deemed more difficult as the information was obtained more difficulty dioxin and breast milk question

Tasks estimated as the highest level of difficulty, Level 5, required the understanding of complex abstract mathematical representations that could be embedded in equally complex texts. As well, the ability to integrate different mathematical information and to generate mathematical justification for the answers obtained was required. An example of the item considered the highest difficulty level was an investment advertisement claiming it is possible to double investment in 7 years based on 10% each year. Readers were asked if it was possible to double $1000 invested at this rate after a period of seven years and to support their answer mathematically.

Different answers were accepted as long as justification and correct calculations were included. A formula was provided, however respondents were not restricted to its use. A calculator was also provided. This task was considered the most difficult as a range of formal and informal reasoning strategies could be combined with formal mathematical knowledge that may not have been accessible to all adult respondents.

The ALLS attempts to differ from the earlier AILS in its conception of numeracy. While the latter assessed and measured numeracy skills by asking adults to apply arithmetic skills to information embedded in written texts, the ALLS maintains that it is concerned not only with "commonly encountered situations that require numerate behaviour, but also *new* situations" by focusing on the "functional demands of different life contexts, on the nature of adults' mathematical and statistical knowledge and skills, and how such skills are applied or used in different circumstances" (Murray, Owen & McGaw, 2005, 291).

While the ALLS claims to measure "at homeness" with numbers and "confidence" with math skills, it also erroneously alludes to its allegiances with both critical and situated numeracy. What follows is a critique of the ALLS representation of numeracy from a New Literacy Studies perspective.

New Literacy Studies and Numeracy

As discussed in Chapter 3, New Literacy Studies (NLS) (Gee, 1991; Street 1996) considers literacy not from the skills based perspective of the dominant functional approach but rather, as a social practice (Street, 1985). The functional approach, referred to as the *autonomous model*, assumes that literacy, "in itself- autonomously- will have effects on other social and cognitive practices" (Street, 2001, p7). The implication is that literacy is bestowed upon people impartially and that the "social" consequences resulting from it are felt after the fact. The problem with this model is that it positions literacy as a universal and neutral construct that obscures the cultural and ideological assumptions that are behind it, as well as the complexity of the problems it purports to alleviate.

In applying the idea of the autonomous model of literacy to numeracy, the new literacy studies perspective argues that similar assumptions have been made about numeracy (Baker and Street, 1994). Historically, numeracy (mathematics) has been portrayed as abstract, beyond value and embodying the purest form of knowledge. However, the ideological model, argues that numeracy, like literacy, is a social practice that varies depending on the particular time and place. Numeracy then is also embedded in social, cultural, institutional and political practices.

The ALLS definition of numeracy seeks to go beyond the standard definition of numeracy as quantification. Drawing upon an earlier United Kingdom study (Cockcroft, 1982, as cited in Murray, Owen & McGaw, 2005)), the ALLS proposes that the meaning of numeracy should also include the attributes of "at-homeness with numbers" enabling individuals with the ability to cope with everyday mathematical demands as well as, the ability to understand and decode how information is represented in mathematical terms, for example, graphs. Moreover, being numerate would imply the ability to critically understand how mathematics can be used as a means of communication.

This definition attempts to be more comprehensive than the "numeracy as quantification" model represented in the earlier AILS study. It chooses to include the idea of "numerate behaviour" and seems to imply that situated "numeracy practices" are being assessed (Murray, Owen & McGaw, 2005, p. 293).

> ... the nature of a person's responses to the mathematical and other demands of a situation will depend critically on the activation of various enabling knowledge bases (understanding of the context; knowledge and skills in the area of mathematics; statistics and literacy), on reasoning processes and on their attitudes and beliefs with respect to numeracy

However, ALLS items that claim to measure "real life" context-specific numeracy knowledge do not. What initially may have begun as problems or texts drawn from "real life" contexts were transformed into test items through a series of elaborate statistical procedures to ensure "test reliability". The end result, a highly selective, manufactured document that obfuscated its own production process was then administered to "subjects"

to measure purported every day numeracy skills. As Barton and Hamilton maintain (2000, 384), " the removal of texts from their own cultural context, the subtle transformations to make them acceptable across populations and the embedding of them in a set of information-processing tasks transforms them into test items".

The idea of an administered "test", particularly equated with numeracy, may have a strong negative association for many resulting in further resistance. Moreover, as surveys such as the ALLS are based on standardizing assumptions, culture and class become problematic. The assumption is that a population identified through its language remains homogenous under that heading. Hence, all test items administered to english Canadian participants are considered to have a similar equivalency of response to American or British English speaking participants. Language is assumed to override cultural variability within and across boundaries.

Moreover, the test items within the ALLS are biased against class. As previously mentioned, tasks estimated as the highest level of difficulty, Level 5, required the understanding of complex abstract mathematical representations that could be embedded in equally complex texts. The item considered the most difficult was an investment advertisement claiming that it was possible to double investment in 7 years based on 10% each year. Readers were asked if it was possible to double $1000 invested at this rate after a period of seven years and to support their answer mathematically. This task was considered the most difficult as a range of formal and informal reasoning strategies could be combined with formal mathematical knowledge that may not have been accessible to all adult respondents. Tasks of this sort, clearly measure membership in a particular discourse and pre-empt any analysis, hardly a neutral exercise. The following concluding

section analyses the ALLS attempt to include images of everyday items from the

perspective of Fairclough's (1992) intertextuality arguing that the familiar does not

establish neutrality but rather creates a naturalized perspective.

Coca Cola and the ALLS

In an attempt to 'familiarize' test items for adults who wrote the ALLS, questions

attempted to include situations of everyday life. As seen below, several of the questions

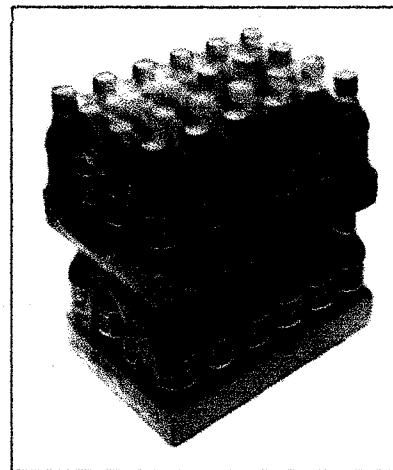were based on problems estimating the value or amount of Coke.

Figure 2. Adult Literacy and Life Skills Survey (ALLS): Numeracy test items.

As stated previously, intertextuality refers to the analysis of texts from a historical

perspective by noting the presence of conventions as well as the inclusion of parts of

earlier texts into the text under analysis. Fairclough (1992) outlines two forms of

intertextualiy, manifest and constitutive. An analysis of manifest intertextuality includes

the excerpts of other texts that are present in the principal text, for example, the use of

direct quotes. Constitutive intertextuality, texts that are comprised of heterogeneous

segments, such as conventions, style and multiple textured strata of textuality that may

not be as obvious to the reader/viewer as manifest intertextuality. Fairclough elaborates

(1992, p. 105)

> Intertextuality is the source of much of the ambivalence of texts. If the surface of
>
> a text may be multiply determined by the various other texts which go into its
>
> composition, then elements of that textual surface may not be clearly placed in
>
> relation to the text's intertextual network, and their meaning may coexist, and it
>
> may not be possible to determine 'the' meaning.

From the perspective of Critical Discourse Analysis (CDA), the inclusion of iconic

advertising, such as Coca Cola, within the ALLS is yet another layer of persuasion.

Surveys that attempt to quantify literacy not only reinforce the myth that the promise of

literacy is prosperity and the trappings of an idealized life (Graff, 1979) but that literacy

is unequivocally universal, a perspective that naturalizes the political project of new

global capitalism (Gee, Hull & Lankshear, 1998).

Rhetorical tropes further craft the ideological face of the ALLS and its policy

documents. Hyperbole, the use of excessive exaggeration, is expressed through the

persistent reporting, both in media and policy studies, of alarming rates of illiteracy and

fear of economic Armageddon. Hyperbole (van Dijk, 1991) can take on nefarious

undertones, as those who are reflected in these statistics become the creators of their own predicaments. Indeed, the ALLS itself in producing a vehicle that seeks to justify the claims of media and public policy has become a metonym. Jasinski (2001) explains that metonymy is a trope in which a word or phrase is substituted for another. The use of metonyms within a policy text can disavow responsibility. Hence, statements such as, "the ALLS maintains" or "the ALLS measures" shroud the political project of institutions such as the OECD and the Word Bank.

When coupled with neologism, the distance becomes all the more objectifying. A neologism is a coined word or a phrase that has been given a new meaning (Jasinski, 2001) Phrases such as 'structural adjustments' and 'life long learning' support the rhetoric of the ALLS. While the former is a euphemism for social and economic inequality, the later borrows from the "empowering " rhetoric of new capitalism. As Spring (1998, 186) explains,

> ...when faced with high unemployment and growing inequality in income, the response of the OECD and World Bank is to blame the worker. Their economists proclaim that workers have not kept up with the changing demands of the labor market. "Let's cut their unemployment and welfare benefits so they will be motivated to work. Let's measure their education according to economic productivity. Let's measure and accredit their work skills. Let's give workers a Personal Skills Card so that employers will be able to account for their worth. Let's end worker resistance to a global economy and technological change by implementing lifelong learning and emphasizing in school the contribution of technological inventions to the progress of humanity." Is this a case of blaming the

victim?

Embedded within these rhetorical devises are the "familiar" consumer images of

the ALLS. The stated intent for including such images was to create "situated numeracy".

As surveys such as the ALLS are set center stage in the global quest for human capital, it

is not paradoxical that the global icon of *Coca Cola*, at one level is meant to portray "at-

homeness" while the same image symbolizes loss of home and livelihood for so many.
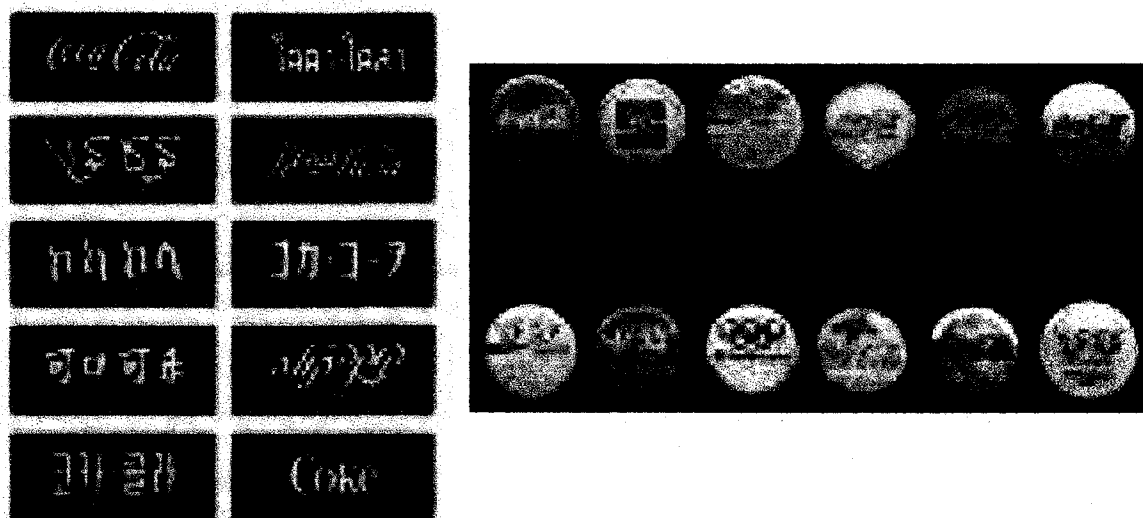

Figure 3. Images of global Coca Cola.

Communities across India, living near Coca Cola bottling plants, are experiencing

severe water shortages because of the large amounts of water re-routed from the local

water supply needed to produce Coke. Other claims that Coke plants have been releasing

their wastewater into the surrounding land and rivers. In two communities, Plachimada

and Mehdigani, Coca-Cola was distributing its waste product to farmers as "fertilizer".

Coke has been accused of selling a contaminated product (India Resource Center, 2008).

In Columbia, Coke was also charged with human rights abuse as it was accused

of establishing "working relations" with death squads to intimidate workers from forming

a union. It has also been accused of union busting in Pakistan, Guatemala and El

Salvador (Teather, 2006). When considering images that equate "at-homeness' clearly the

ALLS definition has definite boundaries.

Chapter 6

Conclusion

Nothing is more threatening to a democracy and
the political existence of its citizens than the illusion
that all questions have been answered, that there are
no meanings to struggle over, that there is no need for
meaning mediation because words are transparent and
speak for themselves.

Gounari, P. 2006 Contesting the cynicism of neoliberal discourse:
Moving towards the language of possibility

We need pedagogies that assume, as their starting
point, the richness and complexity of everyday literacies,
pedagogies that are informed by ethnographic, reflective
stances; that keep in touch with changes, that are responsive,
exploratory, that ask questions…that are prepared to
constantly challenge the institutional walls we build
around learning, not just inviting in but going out,
barefoot into the everyday world.

Hamilton, M. 2005 Just do it: Literacies, everyday learning and the
irrelevance of pedagogy

This thesis has attempted to grapple with the consensual perception of

both *literacy* and *globalization* within the context of neo-liberal capitalism but it also is

concerned with language, how we communicate ideas through language and how

meaning can be masked through language. Gee has suggested (1988 p. 28) that within the

language planning process, we ask ourselves, usually unconsciously, at least three

questions: " What do I want to say? … How do I want what I have to say to be

contextualized, that is, how do I want it placed in the context of what I take the

relationship between myself and my hearer(s) to be? … What deeper themes, images, and

ideas do I want to communicate about the world? ". This concluding chapter will re-visit

this thesis with these questions in mind.

What information do I want to convey?

This thesis has argued that perhaps no phenomena other than *literacy* and *globalization* have approached the status of *cause célèbre* in the latter part of the 20th century and early 21st century. Both terms have peppered print and visual media and have been the subject of electoral rhetoric, public policy and educational reforms as artefacts pivotal to success. Yet, neither term is interrogated outside academia.

Globalization as a concept represents a fundamental paradigm that frames much of the substantial literature in the field. It has been described as the expansion of universal social relations, as the economic splintering and re-consolidation of the world due to burgeoning innovations of technology, as a world without borders and perhaps most importantly, as a fundamentally new phenomenon that is expanding rapidly.

In this thesis, I have argued against this interpretation and have maintained that globalization represents the continuation of a historical process (Tabb, 1997) and that, as a concept, imperialism is a more viable alternative way of understanding global trends. I have also discussed how neo-liberalism, the current globally dominant form of Capitalism, underpins education from the earlier years through educational reforms such as *No Child Left Behind* through to adult education initiatives branded as *Life Long Learning*.

Much of the rhetoric of globalization maintains that the state is withering away to be replaced by larger scale global governing bodies. However, contrary to this claim,

this thesis has argued that for neo-liberal capitalism is to be successful, "globalisation does not mean the impotence of the state, but the rejection by the state of its social functions, in favour of repressive ones" (Kagarlitsky, 2001 quoted in Hill, 2004). Rather, a strong state is vital for neo-liberal capitalism to succeed. Although this "success" is enforced through a series of economic practices, such as, the escalating privatization of the public sector, free trade, controlling interest rates and cuts to social programmes to reduce spending, the relationship between neo-liberal capitalism and education is perhaps of equal importance. I have discussed two ways that the neo-liberal state seeks to capitalize education.

Firstly, if the overarching drive of capitalism is to create profit, then the neo-liberal state will attempt to exploit the resources of previously untapped areas. From the 1970s onward, a "Washington Consensus" brand of political rationality promoting privatization, free trade and deregulation was growing, resulting in intensified pressure from TNCs for free trade expansion to increase wealth and power. At the same time, the burgeoning service sectors, in particular, education and health, of developed countries, became the logical areas to exploit for further profit.

Under proposed trade agreements such as, the General Agreement on Trade in Services (GATS), areas not normally associated with trade were being considered for negotiation. This proposed negotiation included four categories of trade in education. They are as follows (Robertson, 2003 p.263): firstly, the *Cross Border Supply* of courses provided through distance education or the internet as well as any type of testing service and education materials that could cross borders; secondly, the most common type of trade in educational services, *Consumption Abroad* involving the education of foreign

students; thirdly, *Commercial Presence* representing the presence of foreign investors

establishing entire institutions or courses in another country; and lastly, the *Presence of*

Natural Persons facilitating the movement of people providing educational services

between countries. This thesis raised concerns that proposed trade changes would

undermine the *sui generis* fabric of education and its ability to be a public good.

Within this context of neo-liberal capitalism and education, rests the main

analysis of this thesis, that of literacy within the context of neo-liberal globalization.

The second way that the neo-liberal state seeks to capitalize education is in the

production of an ideologically compliant but technically skilled workforce (Gamble,

1988 as cited in Hill 2004).

Fueled by restructuring of the labour market and profound structural changes in

the economy, a social narrative developed warning nations that they were unprepared to

meet and possibly benefit from the challenges of neo-liberalism. Suddenly, it would

seem, previous reports of virtually non-existent levels of illiteracy were inverted and a

"literacy crisis" had appeared. Where illiteracy was the anomaly, now significant

proportions of populations were deemed illiterate.

Traditionally defined as the ability to read and write in page-bound, official

standard forms and *more often than not*, in the official language (Cazden, Cope,

Fairclough et al, 1996), literacy was being marketed as vital to the success of both career

and personal aspirations. Countries with reported greater literacy skills were said to be

more economically stable, to have healthier populations and to exhibit greater overall

employment levels.

Moreover, literacy within this neo-liberal social narrative had changed from the

functionalist definition of merely the ability to read, to the ability to possess a set of

knowledge skills that were inextricably linked to the *development of science, technology

and work* (Statistics Canada, 2004, 81-004-XIE). To ensure that the standardization of

skills was possible, this re-defined version of literacy would need to be quantified.

Measuring literacy through instruments, such as the International Adult Literacy Survey

(AILS) and the Adult Literacy and Life Skills Survey (ALLS), came of age during the

1980s when neo-liberal policies of globalization became entrenched in education policy.

Gounari's (2006) quote at the beginning of this final chapter, refers to the process

of hegemony, of ruling by manufacturing consent, where words are believed to be

transparent and where meaning is not questioned. In contrast to the literacy represented

within the narrative of neo-liberal globalization, new literacy studies (NLS) (Gee, 1991;

Street, 1996) ask questions such as "Whose literacy?" and "At what cost?" and assumes

that "dominant literacies are powerful in proportion to the power of the institution that

shapes them" (Hamilton, 2000). Moreover, literacy is considered not from the skills

based perspective of the dominant approach discussed previously but rather, as a social

practice (Street, 1985). From this perspective, literacy is equated with discourse and as

such, it is more accurate to acknowledge multiple literacies as opposed to the dominant,

unquestioned brand of literacy.

In order to question the assumed transparency of the dominant literacy portrayed

by the Adult Literacy and Life Skills Survey (ALLS), two items from this survey were

analysed using the perspective of critical discourse analysis. As Fairclough (1992a, p. 87)

elaborates: "The ideologies embedded in discursive practices are most effective when

they become naturalized, and achieve the status of common sense". By looking at the

assumptions both stated and implied in the ALLS and its supporting policy document,

Learning a Living, I have attempted to ask questions, look for meaning and to challenge

the institutional walls constructed by neo-liberal discourse.

How do I want what I have to say contextualized?

Through this thesis, I have begun the process of learning about critical discourse

analysis. As Fairclough (1995, p. 17) explains, "discourse analysis can be understood as

an attempt to show systematic links between texts, discourse practices and sociocultural

practices". By applying aspects of the approaches of Gee and Fairclough to an analysis of

items from the Adult Literacy and Life Skills Survey, I have attempted to focus on

systematic links. Consequently, it would be an oversight, if I did not briefly pivot the

same lens upon this thesis.

Any thesis is considered as the 'partial fulfilment of the requirements' for the

appropriate graduate degree and presupposes immersion in particular social practices.

As well, the "actual style and format of a thesis are of the utmost importance. It should

be clear, concise and systematic" (Concordia University School of Graduate Studies,

1989 p.1). In the *Introduction to Educational Research,* Charles (1988, as cited in Zeller

and Farmer, 1999 p.12) maintains that clarity in writing is preferable as it allows the

writer to " get straight to the point, unemotionally, without attempting to use a "literary

style"(p. 182).

When considering the documentation style used in the writing of this thesis, that

of the *Publication Manual of the American Psychological Association* (APA) (5th

Edition, 2003), and its over four hundred pages of precise stylistic guidelines, I would argue that beyond the wrappings of documentation, "clear" assumptions of what is considered legitimate epistemology are being prescribed. Conventions such as third person objectivity and the passive voice imply factual, scientific content that are meant to deliver content beyond reproach. Bazerman (1987) has argued that the APA style embeds behaviourist assumptions "about authors, readers, the subjects investigated and knowledge itself" (p. 129). Moreover, it privileges quantitative research over qualitative and marginalizes other forms of writing such as the narrative or the case study. By purporting to restrict words to their referential function, the social and ideological aspects of language are negated by the APA style. By attempting to construct objectivity, a discourse of power is also being constructed.

What deeper themes or images do I want to communicate?

The three questions borrowed from Gee (1988) that have been used to scaffold this conclusion refer loosely to three interlocking systems of language: the referential system, the contextualization system and the ideology system. While the "referential" system focuses on the literal meaning of language, the "contextual" on a particular social context of shared knowledge and beliefs and the "ideology" system with values, beliefs and worldview, all three work simultaneously within language and discourse and have been separated in this conclusion through literary licence.

I believe that the subject of this thesis, that the act of finally completing this thesis, and that the beliefs alluded to in this thesis coalesce with my own working class background and commitment to social justice. It has become customary for writers to

acknowledge their own biases or sense of agency in the production of their text. It is not accidental that I have waited till my final words to do so. Negotiating the frequently unfamiliar terrain of academia as a working class student has been a clandestine experience. As I learned its secondary discourse through trial and error, academia has seldom been a friendly place. Paradoxically, it has and continues to be a transformative experience. How this will be actualized in the future, is yet undetermined. What follows are research ideas that have been generated through researching and writing this thesis

Further Research

- Rogers (2004) has maintained that discourse analysis has not been that common in educational research and that more rigorous scholarship should include both historical and political contexts. This thesis has set the stage for further work in this area of critical discourse analysis. By exploring other found texts, such as the Quebec CEGEP transcript, I hope to further develop what I have learned. The CEGEP transcript is a familiar artefact of the Quebec educational system. By exploring the political, social and economic motivations that resulted in the creation of this post secondary two or three year school system and by analyzing the neo-liberal language of competency based learning which is evident in the CEGEP transcript, I hope to extend my understanding of critical discourse analysis, as well as, further an analysis of the relationship between education and neo-liberal capitalism within a local context.

- Over the past several months, I have set a Google News Alert to select for news articles that pertain to literacy, literacy and globalization as well as the Adult Literacy and Life Skills Survey. I hope to conduct an analysis of what has been electronically selected. The analysis will attempt to analyze what types of news items were generated, an analysis of the language used to communicate the content of these news items, as well as an analysis of the strategies and policies that Google employs to make these selections.

- I am interested in Gunter Kress' research on visual literacy as well as the study of New Literacies by Lankshear and Knoble. I hope to apply these research areas to the study of images of literacy and globalization, for example, graffiti or the study of images confined to particular spaces such as buses or metro cars.

- By blending critical discourse analysis and class analysis, the narratives of working class students and teachers can be gathered and studied to understand how secondary discourses interact or create resistance and possible transformative learning within educational contexts.

Final Note

A theoretical analysis such as this thesis offers can easily remain abstract. However, theory is never stronger than when it is put into practice. Critical discourse analysis has only recently found its place into the daily practice of the classroom. As Hamilton (2005) eloquently states in this chapter's epigraph, "We need pedagogies that assume, as their starting point, the richness and complexity of everyday literacies,

pedagogies that are informed by ethnographic, reflective stances; that keep in touch with changes, that are responsive, exploratory, that ask questions". As Heath (1983) maintains, insights extracted from this type of exercise may lead to important perspectives on approaches and attitudes towards literacy. Perspectives that could help create more reflexive curriculum decisions, richer educational practice and possibly, a more nuanced approach to classroom ethnographies.

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