The University, State, and Market: The Political Economy of Globalization in the Americas

Robert A. Rhoads
and
Carlos Alberto Torres
Editors

Stanford University Press

THE UNIVERSITY, STATE, AND MARKET

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Edited by
ROBERT A. RHOADS
and
CARLOS ALBERTO TORRES

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To my best friend and wife, Jia Li. Thanks for your love and support and the hope of many years to come.

Robert A. Rhoads

Writers always search for sources of inspiration. Social scientists are no exception. There cannot be sources of inspiration without the consistent, always refined, unconditional love of one's family. In all these years, I continue to draw support, love, and affection from my children, Carlos, Pablo, and Laura, and of course from E. C. F., always there, always mine. Together, they offer me the best of life.

Carlos Alberto Torres

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Contents

List of Figures and Tables

FIGURES

TABLES

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CHAPTER NINE

Mexico's *Estímulos*: Faculty Compensation Based on Piecework

Estela Mara Bensimon
Imanol Ordorika

Entrepreneurial models of the university (Marginson 1997; Slaughter and Leslie 1997) have had a profound effect on Latin American universities and on Mexican universities in particular (Ibarra Colado 2001b; Mollis 2003). Many of the structures, practices, behaviors, and values that we have come to associate with academic capitalism (Slaughter and Leslie 1997) or entrepreneurialism (Marginson and Considine 2000) are evident in Mexico's extreme form of incentive-based variable pay, or *estímulos*, as we refer to them in this chapter. Variable pay based on individual productivity has been in place in Mexico's higher education system for almost 20 years, thus making Mexico's compensation model a paradigm of entrepreneurial practices and their consequences for individuals, the university, and the production of knowledge.

The *estímulos* represent a differentiated system of monetary rewards specifically designed to "stimulate" or "incentivize" faculty to invest time and

effort in the creation of knowledge products that can enhance the international standing of Mexico's higher education system. Under this system all full-time faculty members, regardless of their rank, are entitled to a base salary or "fixed salary" (*salario fijo*), as it is called in Mexico. The base or fixed salary is quite low and for many academics quite insignificant; upwards of 50 percent of an academic's[1] annual salary is based on a combination of national and institutional financial supplements determined on the basis of academic productivity. The system of *estímulos*—which has been portrayed as a "Darwinian nightmare," "perverse," and "savage"—encourages faculty members to be ultraconscious of maximizing the production of academic "pieces" in order to increase their earning capacity. Simply put, the base salary for an academic in Mexico falls far short of a salary considered adequate for a professional, whether in Mexico or elsewhere. Consequently, only those academics who produce the most prized goods (e.g., publications in international journals) and earn extra supplements receive a salary that is representative of a middle-class standard of living.

Critics of the system point out that the race to accumulate "pieces" as fast as possible has weakened the university as a political and moral institution (Suárez Zozaya and Muñoz García 2004), has turned faculty members into "*maquiladoras de* papers" (Díaz Barriga 1997a), and has created an academic culture that is hyperindividualist (Acosta Silva 2004). Scholars in Mexico have provided historical (Canales Sánchez 2001), political (Ordorika 2004a), and organizational (Ibarra Colado 1993, 2001b) analyses of the program. The *estímulos* have also been examined as a rational modernizing strategy (Grediaga 1998; Kent Serna 1995) and as a tool of the state to gain greater control of a university known for its rebellious and independent nature. However, outside Mexico this compensation model is mostly unknown because the many analyses and critiques it has generated have appeared in books and journals published in Mexico. Although systems of variable pay are not widespread in national systems of higher education, there is increased interest in performance-based compensation models, particularly as a viable strategy in times of limited financial resources and increased calls for accountability. The example of Mexico can be quite sobering for advocates of marketlike strategies and particularly merit-based faculty compensation.

In this chapter we examine the *estímulos* both as an outcome of globaliza-

tion and as a means of transforming academics into agents of globalization. The framing questions for this chapter are:

In what ways are the *estímulos* a product of globalization?
In what ways do the *estímulos* transform the practices of academics?
In what ways do the *estímulos* reflect the logic and values of globalization?

We start with a brief definition of globalization, followed by a history of the emergence of the *estímulos* as a modernizing strategy. Next, we examine the ways in which the *estímulos* reproduce the worst effects of globalization in Mexico's academic community.

Globalization as Market Ideology

Globalization has become an all-encompassing concept in the analysis of contemporary society. It addresses, among other things, material transformations at the level of economic production (Castells 1996), the demise of the nation-state (Castells 1997; Evans, Rueschemeyer, and Skocpol 1985), changes in the nature and speed of communications (Carnoy 1998), incredibly fast exchanges in the financial and commercial realms, the preeminence of market and business practices and discourse in many spheres of societal interaction (Touraine 2000), the economization of social life (Wolin 1991), and the emergence of a hegemonic discourse based on deification of the free market (Touraine 2000).

Consequently, globalization has many definitions. In the realm of higher education, for example, globalization has been used in connection with the role of the university in producing "symbolic analysts" for a knowledge- and globally based economy (Altbach 2003; Morrow and Torres 1995). It also has been used to denote communication processes that have made the world smaller (Currie 1998).

Slaughter and Leslie (1997) identified two distinct processes through which globalization manifests itself in higher education. On the one hand, globalization becomes tangible through the reduction of public money for higher education institutions. On the other hand, globalization materializes in the emergence of new markets and market connections for higher education products and institutions. The adoption of market-oriented and market-

like behaviors in colleges and universities has become one of the most relevant features of contemporary higher education (Slaughter and Leslie 1997).

Merit pay compensation for faculty in Mexico—the *estímulos* programs—is a significant example of the adoption of marketlike behavior in higher education. It is our understanding that *estímulos* policies are part of a redefinition of the relations between public higher education and the state in Mexico. These programs are a local expression of higher education policies and guidelines that have become hegemonic at the international level.

Estímulos policies are the product of both material constraints on higher education—financial deprivation—and market-oriented ideologies. Consequently, our analysis of the *estímulos* is informed specifically by the conceptualization of globalization as "a market ideology with a corresponding material set of practices drawn from the world of business" (Currie 1998, p. 1). In this chapter we examine how the market ideology that is characteristic of globalization is manifested in the rationality of the *estímulos* and in the practices that have ensued among those who implement them and among those who participate in the program.

The Estímulos *Programs*

We use the term *estímulos* in reference to the two largest sources of compensation that affect an academic's monthly paycheck in Mexico. These two sources are the Sistema Nacional de Investigadores (SNI; National System of Researchers) and the institutional programs that go by different names or acronyms at each university (e.g., PRIDE at the Universidad Nacional Autónoma de México [UNAM]).[2]

Even though the national and institutional programs are different, both of them emerged during periods of severe economic stress, the first in 1982 and the second in 1990. In 1982 the heavy reliance on the oil trade in the Mexican economy and the increase in foreign debt generated an economic crisis. The International Monetary Fund (IMF) put forward a "rescue package" with a corresponding structural adjustment plan for the Mexican economy. The conditions imposed by the IMF on Mexico were reorganization of public finances, control of inflation, reduction of public expenditure, and guaranteed foreign debt payment (Ordorika Sacristán 1996). These policies re-

duced the flows of resources to higher education. Faculty salaries, which had been declining steadily since the mid 1970s, hit an all-time low in the early 1980s. To make ends meet, faculty members were forced to moonlight at other universities or even secondary schools, an activity that in Mexico is referred to as *chambismo*. In the 1980s *chambismo* became a common practice of supplementing one's salary, and as more faculty members engaged in it, *chambismo* came to be seen as a threat to the integrity and quality of the higher education system. Along with *chambismo* the university faced the loss of its most reputable scholars, who were lured away by the higher salaries and better academic working conditions in systems of higher education in other countries—"brain drain."

The rise of *chambismo* and the occurrence of brain drain were particularly detrimental to the academic standing of UNAM and other public universities. According to government officials' and university administrators' accounts of this period, the national financial crisis made across-the-board adjustments of academic salaries prohibitively costly. Faculty salary increases, however, were contained below increases of national minimum wage and were well under increases of university budgets (Ordorika 2004b). On the one hand, this alleged scarcity of resources precluded the option that every academic would receive a fair salary. On the other hand, if academic salaries continued to deteriorate, Mexico was at risk of losing its most talented academics. This particular construction of the problem led university administrators and a small group of senior and well-positioned academics, primarily from UNAM and El Colegio de Mexico, to come up with the creation of the SNI as a solution (Canales et al. 1999).

The SNI was founded in 1984. It is no coincidence that this program was put in place at the height of the "quality" movement in higher education at the worldwide level. In this context the notion of a reward system tied to quality and productivity was highly appealing to individuals, primarily administrators and government officials, who thought that higher education, namely, UNAM, needed to be more businesslike in its operations.

Sistema Nacional de Investigadores

Official documents at the SNI website describe the purpose of the SNI as "strengthening and stimulating the efficiency and quality of basic and ap-

TABLE 9.1
Sistema Nacional de Investigadores *(SNI):*
Amount of monthly supplemental compensation by rank

SNI rank	Compensation
Candidate to become a national investigator	Three times the monthly minimum wage
National Investigator Level I	Six times the monthly minimum wage
National Investigator Level II	Eight times the monthly minimum wage
National Investigator Level III	Fourteen times the monthly minimum wage
Emeritus National Investigator	Fourteen times the monthly minimum wage

SOURCE: *Reglamento del Sistema Nacional de Investigadores*, December 22, 2003; available at http://www.conacyt.mx/dac/sni/reglamento-sni-2004.html

plied research . . . [to] ensure that there [is] a national scientific community that has the resources needed to advance the production of knowledge and work toward the resolution of the nation's most hard-pressing problems." Because the SNI adopted the language of efficiency and quality, many see it as an instrument designed specifically to legitimize the corporatization of higher education. And, even though the emergence of SNI is represented as a strategy to protect the prestige of the university and prevent brain drain, advocates of the programs' incentives are seen by some as having had a convenient pretext to introduce the strategies of the new managerialism through a reward system that would bring the greatest benefits to individuals, who in normal financial times might have been its greatest foes.

The SNI consists of four ranks, plus an "emeritus" rank (see Table 9.1). Individual academics receive a monthly salary supplement based on their rank. The supplement is calculated on the basis of the national minimum wage.[3] For example, the monthly minimum wage in Mexico in 2003–2004 was 1,290.95 Mexican pesos.[4] Thus an academic who had the rank of Investigador Nacional II would qualify for eight times the minimum wage, that is, 10,327.60 pesos additional compensation per month. This compensation is roughly equivalent to US$920.00 a month.[5]

To be admitted to the SNI, an academic has to have a doctorate and has to be a full-time instructor or researcher—two criteria that rule out most of Mexico's faculty. Moving from Level I to Levels II and III (*Nivels* I, II, and III) is extremely difficult, and, as shown in Table 9.2, it is clear that most SNI members are concentrated at Level I. Needless to say, academics who rise to Level III wield a great deal of power and influence.

TABLE 9.2

Sistema Nacional de Investigadores *(SNI): Members by year and level (1984–2001)*

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Candidates	212	651	1,121	1,499	1,588	1,859	2,282	2,502	2,655	2,274	1,683	1,559	1,349	1,297	1,229	1,318	1,220	1,128
Level I	797	1,127	1,353	1,338	1,523	2,010	2,453	2,636	2,860	2,810	3,012	3,077	3,318	3,546	3,980	4,193	4,346	4,682
Level II	263	339	374	413	480	550	691	718	779	797	807	839	862	952	1,032	1,157	1,278	1,556
Level III	124	159	171	208	183	247	278	309	308	352	377	393	440	483	501	584	622	652
Total	1,396	2,276	3,019	3,458	3,774	4,666	5,704	6,165	6,602	6,233	5,879	5,868	5,969	6,278	6,742	7,252	7,466	8,018

SOURCE: SNI-CONACYT, *Estadísticas Básicas 2001–2002* (mimeo).

Being admitted to the SNI is almost as prestigious as it is for US academics to be named a fellow of the National Academy of Sciences, except that in the United States this is exclusively an honorific title that accrues status but no additional compensation. In contrast, earning the SNI anointment represents a major attainment in terms of income (again, see Table 9.1) and status. To be a member of the SNI is to be a member of a select and exclusive academic club that gives access to all kinds of benefits, rewards, and coveted perks. The SNI represents Mexico's mandarin academic class, a sort of academic oligarchy. In addition to receiving a higher monthly salary, SNI members become eligible for research grants and for participation in high-level committees at their own universities, and they have access to administrative assistants, better offices, more travel funds, the use of international telephone calling cards, and so forth. In a research center of 80 full-time academics, of which only 5 are SNI members, being one of those five carries a lot of weight.

Academics who are admitted into the SNI are an important asset to their academic units because the number of SNI members is one of the measures used by UNAM's administration to evaluate and compare quality across research institutes and centers. From this condition—in addition to the prestige entailed by membership in SNI, and given the small relative amount of faculty included in the system—SNI members derive a certain degree of power within their institutions. The power and prestige associated with SNI membership for individuals, their departments, their universities, and the system as a whole are also stratified.

Access to SNI in each of its areas and levels is decided and overseen by the Comisiones Dictaminadoras (evaluation committees), which are made up of 12 Level III *investigadores*, whose responsibility it is to review the dossiers for applicants who seek admission, renewal, or promotion and then determine their eligibility. Level I members have to be reviewed every three years, Level II members every four years, and Level III members every five years.[6] Just as members can be approved for a new three-year term, they also can be demoted to a lower rank or eliminated if their productivity is judged to have declined in the interim period. Unlike in the United States where the possibility of losing tenure is a rare occurrence, being demoted or eliminated from the SNI is a real possibility and it represents a major embarrassment. As one academic put it, "To lose one's status in the SNI is as much of a disgrace as having one's stripes taken away." The small cadre of Level III members

TABLE 9.3

Sistema Nacional de Investigadores *(SNI): Members by area, gender, and rank (1999)*

	Candidate		Level I		Level II		Level III		
Area and gender	Number	%	Number	%	Number	%	Number	%	Total
Humanities and social sciences	258	100.00	1,222	100.00	331	100.00	193	100.00	2,004
Men	147	56.98	688	56.30	216	65.26	142	73.58	1,193
Women	111	43.02	534	43.70	115	34.74	51	26.42	811
Science and technology	1,060	100.00	2,971	100.00	826	100.00	391	100.00	5,248
Men	712	67.17	2,240	75.40	692	83.78	353	90.28	3,997
Women	348	32.83	731	24.60	134	16.22	38	9.72	1,251
Total	1,318		4,193		1,157		584		7,252

SOURCE: SNI-CONACYT, *Estadísticas Básicas 2001–2002* (mimeo).

plays a major role in running the system and controlling access to each level. Level III members have become the gatekeepers of the system. This control becomes apparent when looking at the number of members in each level (see Table 9.2).

The most recent statistics show that the SNI has grown from 1,396 members, when it was first established in 1984, to 8,018 members in 2001. Levels I and II have increased at a faster pace than Level III. In 2001 *candidatos* and Level I members made up 72.5 percent of the total membership in the system. On average, Level III membership has been about 6.6 percent of the total. It decreased from 8.88 percent in 1984 to 4.67 percent in 1992. Since 1992 it has grown slowly to 8.13 percent of the total in 2001.

SNI membership is organized into seven disciplinary areas: physics, mathematics, and earth sciences; biology and chemistry; medicine and health sciences; humanities; social science and administration; biotechnology and agriculture; and engineering. SNI membership is heavily skewed toward the sciences and technology, which in 1999 made up 72 percent of all SNI members (see Table 9.3). The SNI is also heavily male; men make up 72 percent of the membership. As the rank increases, so does the share of men; for example, men make up 70 percent of Level I but 85 percent of Level III. Among women, the reverse is true: Women's share decreases as rank increases. Not surprisingly, UNAM has the highest share of SNI members, 29 percent. In addition, among UNAM's academics, the likelihood of gaining access to the SNI is much greater for those individuals who are affiliated with one of the university's research institutes or centers (such as the Institute of Social Science or the Center for the Study of the University) than for those who are affiliated with one of the discipline-based departments (such as philosophy or history) or professional schools (such as law or engineering).

The Path to PRIDE

In February 1990, President Carlos Salinas announced the establishment of a new program of productivity incentives to compensate faculty members. The SNI was founded to provide incentives to Mexico's top academics and to stimulate the professionalization of academic personnel. The institutional *estímulos* were driven much more explicitly by a market ideology; to stimu-

late academic production, the state needed a system of rewards and punishments that had real and significant consequences on the lives of individuals. Salinas's announcement of the institutional *estímulos* marked the beginning of a policy change in higher education with regard to the role of the state versus the role of the university. PRIDE was an initiative that came directly from the government without participation from the academic body, faculty, or administrators.[7] In an analysis of the operation of PRIDE between 1990 and 1996 at UNAM, Alejandro Canales Sánchez (2001) observed that 20 years earlier such an intervention would have been inconceivable, least of all without the participation of the union. Because PRIDE encompasses a much larger number of academics, it has had a much greater impact on the academic culture than the SNI.

PRIDE is similar to the SNI in that it also represents a modernizing movement to spur scientific and technology activities (Canales Sánchez 2001, p. 65) by providing merit-based salary supplements to those individuals who choose to participate in the system. Like the SNI, the rationale behind PRIDE is that in order to stimulate academic production, incentives need to be put in place to make up for the loss of buying power among those academics with the greatest potential and motivation to be productive. PRIDE did away with across-the-board annual salary raises, and it further segmented the academic community on the basis of their ranks in PRIDE and the SNI. PRIDE also resulted in the institutionalization of an extensive and expensive evaluation apparatus.

PRIDE was established during a period in which higher education, particularly UNAM, came under great criticism from politicians. Canales Sánchez points out that, higher education institutions were being exhorted to improve their quality and to be more responsive to national and international needs and circumstances. Leftist politicians were also critical of the university, but for different reasons. The universities were seen as unresponsive to the masses who struggled for economic emancipation, and they were called on to improve their quality not to be more competitive in the global market of higher education but simply because it was their duty. Ironically, as we discuss later, one of the most detrimental consequences of the *estímulos* is to discourage social action research.

The PRIDE system of *estímulos* is different from the SNI in several ways. For example, although only 29 percent of UNAM's academics are members of the SNI, 83 percent qualify for PRIDE. PRIDE is less selective, and it

TABLE 9.4
PRIDE levels

	Level A	Level B	Level C	Level D
Amount of supplement as a percentage of the base salary	45%	65%	85%	105%

SOURCE: *Convocatoria PRIDE 2002*, available at http://dgapa.unam.mx/pride

functions much more like an entitlement. SNI's evaluation criteria are relatively stable and equivalent at a given time. Changes in evaluation policies and requirements from one selection period to another are relatively small. The SNI is basically a national and standardized program in which every applicant is usually evaluated on the basis of the same criteria regardless of whether their institutional affiliation is public or private. In contrast to the SNI, PRIDE is administered at the institutional level and there are inter- and intra-institutional variations in the evaluation criteria and in the approaches that are used to carry out the evaluation. For example, at UNAM the evaluation commissions, some of whose members are elected, have a great deal of latitude in determining what counts and by how much. The disparities in the definitions that are used create situations in which one unit might define teaching loosely (e.g., working individually with a couple of students), whereas in another unit teaching may be defined in precise terms (e.g., a six-hour course). The same disparities exist in how research is evaluated, with some commissions adhering to stricter standards and others accepting minimal standards.

PRIDE's salary supplement is calculated as a percentage of each faculty's base salary and seniority according to four ranks: A, B, C, and D (see Table 9.4).

In 2000 there were 8,249 participants in UNAM's PRIDE, and of these only 7 percent were in Level D. The criteria for participating in PRIDE are more flexible than for the SNI. Individuals with a master's degree qualify for Levels A and B; a doctorate is required for Levels C and D.

Living Under the Estímulos

To provide an idea of what an academic paycheck looks like, we have included a copy of a pay stub for a full-time academic who has reached Level C in

UNIVERSIDAD NACIONAL AUTONOMA DE MEXICO UNA-290722-7Y5 025099000 FOLIO 0300838

NOMBRE DEL BENEFICIARIO	REG. FEDERAL					QNA	AÑO
OOSI581031HDFRCM05	OOSI581031CG4	97456	NOTIFICACION DEPOSITO CTA. 21301501 18	80905804524	58588393 BANCOMER	03	2004

ORDORIKA SACRISTAN IMANOL

DESCUENTOS	IMPORTE	CATEGORIAS	IMPORTE	CODIGO PROGRAMATICO
IMPTO PERSONAL	1,188.49	INV TIT A T C	5,523.00	32022130113105
FONDO PENSION	407.16	COMP ANT DOCTE	1,988.28	32022130113909
SERV M ISSSTE	135.72	MAT DIDACTICO	145.00	32022130134201
72MULTISEGURO	440.01	PRIDE 2002	6,384.59	32022130135507
DES STUNAM DOC	75.11			
SEG VAR ACAD	1.74			
TOTAL DESCUENTOS C	2,248.23	TOTAL PERCEPCIONES	14,040.87	11,792.64

IMPORTE NETO

PERIODO DE PAGO: 01/FEB/2004 AL 15/FEB/2004 FECHA DE PAGO: 10/FEB/2004

Figure 9.1 Pay stub for UNAM full-time academic at Level C in PRIDE

PRIDE (see Figure 9.1). This faculty member belongs to a research institute and has been an academic for 18 years. The second column, row one, "INV TIT A T C" ("Investigador Titular 'A' tiempo completo")[8] indicates that this individual's biweekly base salary amounts to 5,523.00 Mexican pesos (US$482.00). The fourth row in the second column, "PRIDE 2002," provides the supplemental amount, 6,384.59 pesos (US$558.00), which represents 85 percent of 5,523 pesos (the base salary, US$483.00) plus 1,988.28 pesos (US$174.00), which is the amount of compensation based on seniority. For this individual the PRIDE compensation represents 45.47 percent of his university salary. As a member of SNI Level II, he also qualifies for an additional 10,327.60 pesos (US$900.00) per month, which is not shown on this pay stub. This means that more than 60 percent of this individual's salary is made up of supplemental compensation.

The weight of merit-based supplements increases for *Titular* C's, PRIDE Level D's, and SNI Level III's. These are usually senior faculty, commonly referred to in jokingly as DC3's. A 30-year DC3 earns a total monthly salary of 72,663.91 pesos (US$6,346.00, including base salary, seniority compensation, PRIDE, and SNI). Before taxes, supplemental compensations (SNI and PRIDE) represent 63 percent of the DC3 salary.

At the Universidad Autónoma Metropolitana (UAM), the second largest university in Mexico, the situation is similar to that at UNAM, even though UAM uses a different system to distribute the PRIDE *estímulos*. A professor who is ranked at Level C in the UAM system can earn about 39,700 extra pe-

TABLE 9.5
Universidad Autónoma Metropolitana *point system*

Activities and products	Points
Textbook	2,200–6,600
Scientific book	2,200–6,600
Article or chapter in a book	880–3,300
Participation in faculty evaluation committees	1,100–1,100
Having earned a master's degree	6,600
Having earned a doctoral degree	15,400

sos per month, and if the professor is in the highest SNI level, his or her monthly salary can go up to 55,600 pesos. Of the 55,600 pesos, only 22.7 percent represents the base pay, and the remainder is subject to change from year to year depending on the professor's continued productivity.

Evaluation at UAM is based on a standard point system that is uniform for all faculty members regardless of discipline. According to Ibarra Colado (2001a), this point system represents the most radical approach to the implementation of the *estímulos*. The point system is divided into three areas: academic experience, professional experience, and education. A sample of what this point system looks like for a few of the indicators is provided in Table 9.5.

The Impact of Estímulos

Estímulos programs represent many of the characteristics that we have come to associate with the effects of globalization. We discuss four outcomes of globalization that are reflected in the *estímulos* programs: (1) labor flexibility and anti-unionism; (2) the polarizing consequences of knowledge-based economies; (3) the loss of academic identity, hyperindividualism, and competition; and (4) the dominance of the market.

LABOR FLEXIBILITY AND ANTI-UNIONISM

Institutionally based *estímulos* are described in Mexico as the program of salary "*deshomologación*" (Ibarra Colado 2001a; Suárez Zozaya and Muñoz García 2004), which literally translates into "dehomogenization" of compensa-

tion and marks the end of across-the-board raises. As we pointed out, more than 80 percent of the full-time academics at UNAM qualify for these *estímulos*, so they seem to have taken on the characteristics of a traditional system of annual salary raises.

The number of academics at UNAM alone who qualify for this supplement is almost as large as the number of academics nationally who qualify for membership in the SNI. So, given that the system now reaches just about everyone who meets the minimum expectations of academics, why continue to treat it as a supplement rather than as regular pay? For sure, the system does not represent a major savings, given that it covers more than 80 percent of the full-time academic personnel. Moreover, the administration of the program has resulted in an extensive and bureaucratic evaluation apparatus that, according to Ibarra Colado (2001b), is an extremely expensive system of regulation and surveillance.

The rationale behind the institutional *estímulos* is not so much that it accrues savings but that it is politically expedient in different ways (Ordorika 2004b). First, because *estímulos* represent "supplements" rather than regular pay, the government can bypass the requirements for negotiation with faculty unions. Second, *estímulos* embrace one of the most significant principles of flexible labor by linking wages to individual productivity on a variable basis. Third, *estímulos* produce a severe stratification of faculty on the basis of salary. They have created a significant group of marginalized academics who have no access to supplemental compensations and associated resources for academic work. University administrations assumed that marginal researchers and instructors would resign over time and in this way reduce the number of overall faculty by getting rid of the least productive members. Finally, *estímulos* were adopted because variable pay could increase administrators' control over faculty and become a powerful device to induce administration-directed change.

ACADEMIC *MAQUILADORAS*

Ibarra Colado (2001b) noted, "Today, those of us who participate daily in the university are very different from who we used to be" (p. 391). The primary instruments of control are the point systems that determine an academic's eligibility for the different incentives and that have become, "little

by little, powerful instruments of planning and evaluation of the academic work, as they determine priorities in activities and privilege, [which] can be quantified" (p. 391). The mind-set and practices of academics as individuals and collectively change radically to fit into a context where monetary value is attached to academic products according to how much they weigh on the globalized scale of prestige and excellence.

The point systems, whether they are explicit, as at UAM, or implicit, as at UNAM, become powerful instruments of regulation in that academics become superconscious of what they should do to maximize their points. The point system makes it possible to differentiate academic work between those who generate the greatest economic benefit and those who do not. It converts individuals into academic *maquiladoras* who are pushed little by little to engage in certain activities and disregard others.

Under the rule of the *estímulos*, the "clearest example" of the most desirable academic is one who "generates original knowledge and disseminates the results in peer-reviewed publications and, particularly, in international journals" (Coordinacion de la Investigacion Científica 2001, p. 15). The image of the exemplary academic being promulgated under the influence of the *estímulos* represents a far more dangerous form of brain drain than the kind that the SNI *estímulos* were originally designed to prevent. The *estímulos* may be effective in keeping the most prestigious and productive academics in Mexico's universities, but the kind of work the *estímulos* encourage may represent wasted talent and the production of knowledge that is unresponsive to the most urgent educational, social, and economic needs of the people of Mexico. For example, this chapter, which is being published in a book by a prestigious press in the United States, represents the kind of scholarship that earns the highest amount of money and accrues the most prestige in Mexico's *estímulos* system. In contrast, if instead of this chapter, one of us (Ordorika) wrote about this very same topic and published it in a Mexican journal or as an opinion piece in the national press in order to increase awareness of how the *estímulos* stimulate knowledge products that are irrelevant to Mexico's most pressing needs, it would decrease significantly in monetary[9] and prestige value. In this way encouragement to adopt research topics and strategies according to research agendas from the central countries and for the publication of books and articles at the international level becomes a form of knowledge and capital transfer from peripheral to central countries.

EROSION OF COLLEGIALITY

Supplemental compensation—institutional *estímulos* and the SNI—have introduced two distinct dynamics into academic bodies. On the one hand, we have addressed the issue of faculty stratification. This is a process of differentiation based on salary levels and prestige associated with participation in *estímulos* and the SNI. On the other hand, faculty differentiation is enhanced by intense competition among academics, an intrinsic characteristic of any variable pay system.

Many higher education specialists in Mexico have pointed out that *estímulos* systems, at the institutional and national levels, have destroyed the social fabric of academic communities and eroded collegiality (Díaz Barriga 1997b). This is evidently a consequence of any variable pay system associated with productivity, given the fact that these systems stimulate competition among members of the organization and disarticulate the connections between individual and organizational objectives (Díaz Barriga 1997b; Ordorika 2004b). Competition favors confrontations between academics and erodes collective identities. It also increases faculty individualism. Traditional interactions of collegial life and shared academic activities are disrupted because they become burdensome and inefficient in the quest for productivity "points" or even dangerous in the competition with colleagues.

DOMINANCE OF THE MARKET

According to many academics' perceptions of *estímulos*, these systems have deeply transformed the nature of academic work and its products (Díaz Barriga 1997b; Ibarra Colado 1999, 2001b; Suárez Zozaya and Muñoz García 2004). Faculty members usually state that long-range research projects are abandoned in favor of others that yield results faster. It is also argued that work on books or broader academic projects has given way to article writing. Even the selection of research topics is biased toward those that yield the highest returns.

These practices play a major role in orienting academic production. Traditional concepts such as "academic freedom" and "disinterested pursuit of knowledge" are put into question (Díaz Barriga and Pacheco 1997). The search for high returns in academic activities in this competition for addi-

tional compensation transfers decisions about the degree of individual conformity vis-à-vis institutional research programs and academic practices to each faculty member. The economic needs of academics create concrete limits to academic freedom for each individual at the university (Ordorika 2004b). In this way "market value" of academic products in this system of competition shapes the nature and content of academic work.

SCHOLARSHIP GONE WILD

In an essay on economic globalization and its consequences for the common good, Benjamin Barber (2000) put forth the idea that in countries such as Russia the adoption of free-market economies without the existence of democratic institutions to control and regulate them leads to a "brutal Social Darwinism" and "wild capitalism" that end up worsening economic circumstances (p. 2). He reasoned that the expansion of US-like free-market economies to countries that do not have a history or tradition of democracy "means we have globalized our vices without globalizing our virtues" (p. 2). Although we recognize the faulty reasoning behind the idea that democratic states of the West possess safeguards against corrupt practices and unfair competition, we agree with Barber's analysis that free-market practices do not automatically transform the system of governance and decision making.

Just as Barber suggests that the globalized marketplace produces "wild capitalism," we suggest that globalized definitions of academic quality, excellence, and productivity that are being promulgated through the system of *estímulos* unleash academic simulation, corruption, and credentialism (Acosta Silva 2004; Díaz Barriga 1997b). Similarly, we can say that the worst aspects of academic culture have become global: the quantification of scholarship, the academic star system, the obsession with university rankings and citation indexes, and so forth. In the United States the effects of these "academic vices" are moderated by the sheer size of the system and its diversity (in types of institutions). In a country such as Mexico, where higher education is smaller in number and in variety of institutions as well as in the proportion of academics who hold full-time appointments, the effects of globalization can be disastrous on several levels, as pointed out by Ibarra Colado's (2001b) indictment of the system:

> [It] discourages long range projects, generates high levels of stress and anxiety, and disrupts academic communities and their internal cohesion. It discourages reflection and has awakened the most primitive appetites of individual self interest, opportunistic and selfish behaviors that rule the post-ethical society of men. This unregulated competition for money atrophies critical reflection, positing academic work and each of its products as simply mediums of getting money regardless of the quality of the work. All we have left are the procedures, isolation, an unwillingness to share ideas for fear of being stolen, and weakening dialogue and communication. (p. 401; translated from Spanish by E. M. Bensimon)

Accordingly, academic work under the rule of the *estímulos* becomes a "privatized affair whose aim is to produce competitive self-interested individuals vying for their own material and ideological gain" (Giroux 2002, p. 429). And, identity shifts from that of being a scholar to that of being an entrepreneur (Currie and Newson 1998; Marginson and Considine 2000). To be blunter, the *estímulos* represent a sizable amount of income and they can distort academics' relationships to one another in much the same way as someone in a commission-based sales job might scheme to out-compete his or her associates.[10]

To put it even more bluntly, the stakes in this system are high enough that some faculty members might respond by being conniving about the kinds of activities most worthy of time investment. Ibarra Colado (1993, 2001b) warned that some faculty members respond to this system of supplemental pay by thinking in terms of "If I do this, it counts; but if I do that, it will not count."

BOTTOM-LINE SCHOLARSHIP

The system of *estímulos* can also have disastrous consequences on the role and responsibility of academics to address the urgent social conditions of the great majority of Mexico's population. The structure of the system encourages academics to concentrate on the production and accumulation of various forms of academic products as rapidly as possible to maximize their pay. For social scientists the most efficient response to the compensation structure is to invest time on publications that are not labor intensive and that do

not require extended periods of data gathering and analysis. The lack of funding for large-scale investigations of urgent social problems exacerbates the consequences of this structure on the quality of social science scholarship. Accordingly, the combination of the compensation structure and the lack of funded research engenders academic work that is heavily concentrated on literature synthesis, critical assessments of policies and practices, and historical accounts. For example, in the field of higher education studies, there is an abundance of publications on the history of UNAM and collections of edited books on topics that are primarily centered on the university as a political institution and on descriptions and analyses related to various aspects of the faculty. In contrast, there is almost no research on differential patterns of access and educational attainment for historically disenfranchised groups, such as those from low-income backgrounds, indigenous people, and women.

ACADEMIC HAVES AND HAVE-NOTS

One of the consequences of globalization is to polarize societies into a large group of individuals who fill the many low-level service jobs that are needed to support an information- and knowledge-based economy and a much smaller and elite group who control access and participation to the new economy. Mexico's academic compensation system has created a similar division in that resources are concentrated in a small group of privileged academics. A much larger group of academics—the majority of whom are part-time, lack a doctorate, and are outside the academic networks that provide opportunities for publication—carry out the lion's share of undergraduate teaching. Academics who are affiliated with one of UNAM's 39 research institutes and centers make up only 10 percent of the full-time academic personnel, but they constitute the majority of the SNI members from UNAM. The research centers' full-time researchers are required to teach much less, and when they teach, they typically do so in small graduate courses on topics of their own choice. At UAM the division between those who do research and those who teach is magnified by the criteria for the allocation of productivity points. Although research activities can generate 3,300 to 6,600 points, teaching activities generate only 110 to 660 points, or about one-tenth of what can be earned from activities that are labeled research and scholarship.

Conclusion

The Mexican case shows how policies and practices derived from globalization erode traditions and values entrenched within higher education. Notions of scholarship and academic work are challenged by these policies and practices. The academic implications of the adoption of marketlike procedures in higher education are seldom considered in advance. Proponents and supporters of systems such as the *estímulos* argue that the adverse effects that these policies have on collegiality, scholarship, and knowledge production are the consequence of deficient implementation. In our view the *estímulos* are functioning in ways that are consistent with and expected of market-based practices.

The *estímulos* can be seen as a "technology of control" that works in invisible ways and transforms the identity of the academic, but in ways that may seem rational and logical. In the United States university officials and academics deplore the competitive frenzy for prestige that has been created by the annual ranking of universities in *US News and World Report*. Yet they make its existence possible by complying with the magazine's annual survey. The same is true with regard to the *estímulos*; at the same time that academics are critical of them, they also participate in the legitimization of the system by complying with the evaluation requirements and doing what they can to maximize the number of points they accumulate.

It is indeed not rare for an academic to recognize the perversity of the system yet also to work very hard to ascend in the system and maintain a favorable position in it. The *estímulos* have been extraordinarily effective in getting individuals to submit to and perpetuate a system that is recognized as polarizing. As Currie (1998) observed, "The frightening aspect of globalization is the subtle way the process works to infiltrate institutions so that resistance to its agenda is weakened. It takes a mammoth effort to question these practices" (p. 6).

Compliance with variable pay systems in Mexico, however, is not surprising. It reveals how strong and far-reaching the ideological components of globalization are. Strategies based on business practices and a free-market orientation are now commonplace and quite legitimate in a variety of institutions, and universities are no exception. One of the most salient features of

globalization is the escalation of competition, and Mexico's *estímulos* programs symbolize a response that, by all indications, is likely to become an option of increasing appeal to tertiary education systems worldwide that feel the pressure to be competitive despite diminishing resources.

Notes

1. Throughout this paper we use the term *academic* rather than *faculty member* or *professor*, because most of our discussion focuses on the enactment of the *estímulos* at the Universidad Nacional Autónoma de México (UNAM). The UNAM faculty consists of a large group of instructors, full- and part-time, and a much smaller but much more privileged group of *investigadores* (researchers), who are affiliated with research centers rather than with disciplinary colleges or departments. Accordingly, we use the term *academic* to refer to individuals who are instructors or researchers.

2. PRIDE stands for Primas al Desempeño del Personal Académico de Tiempo Completo (Primes [Incentives] for Full-Time Faculty Performance). The Universidad Autónoma Metropolitana (UAM) has three different incentive programs: Beca de Apoyo a la Permanencia (Permanent Scholarship), Estímulo a la Docencia y la Investigación (Incentives for Teaching and Research), and Estímulo a la Trayectoria Académica Sobresaliente (Incentives for Faculty with Extraordinary Academic Careers).

3. National minimum wages are established on a yearly basis by the Comisión Nacional de Salarios Mínimos de la Secretaría del Trabajo y Previsión Social (National Commission on Minimum Wages deriving from the Federal Secretary of Labor).

4. In 2004 the daily minimum wage was 43.297 pesos ("Salario mínimo general promedio de los Estados Unidos Mexicanos 1964–2004," available at http://www.conasami.gob.mx/estadisticas/ docs/Salminprom_64_04.pdf).

5. According to Banco de México, on September 20, 2004, exchange rates were US$1 to 11.45 Mexican pesos (http://www.banxico.org.mx).

6. According to SNI's regulations, after completing the first review in each level, Level I and II members are reviewed every four and five years, respectively. Level III members are reviewed every 15 years after they have completed two periods in that level (Reglamento del Sistema Nacional de Investigadores, December 22, 2003, available at http://www.conacyt.mx/dac/sni/reglamento-sni-2004.html).

7. We refer to the institutional program of incentives at UNAM as PRIDE. Originally called Programa de Estímulos a la Productividad y al Rendimiento Académico (Incentives for Academic Productivity and Performance Program, PEPRAC), this program was changed several times. It was established in its present form and under the name PRIDE in 1994.

8. This is the equivalent of a full professor. There are three levels of full professors at UNAM: A, B, and C. *Investigador* (or *Profesor*) *Titular "C"* is the highest level of faculty appointment at this university.

9. We also wish to note that the attachment of points to academic products is not unique to Mexico's system of higher education. At the Rossier School of Education at the University of Southern California, where Bensimon holds her academic appointment, this chapter will garner her four points in the school's performance index that is used annually to determine merit-based raises (see Bensimon and O'Neil 1998).

10. Not everyone agrees with the view that before the entrepreneurial university model the university was a more collegial and congenial place. For example, Carmen Luke (2001), a critical feminist theorist and policy analyst, suggested that "pastoral" pedagogies and administrative systems associated with the premanagerial university, such as "consensus style management," "collegiality," and "co-operation and support," were in fact the informal mechanisms of patriarchal culture and rule that managed to rule out difference (p. 436). She asked, "Indeed, was the 'Golden Age of Academic Autonomy Prior to Managerialism' an epoch of access, equity and enfranchisement for women and people of color?" (p. 436). Luke suggested that the transparency of the new tools may be a better system for women and others. However, as we have shown, the fact is that the kinds of productivity that are associated with garnering more points constitute activities that are enabled by academic social networks that are predominantly male.

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