

# DEMOCRATIZATION, EDUCATION REFORM, AND THE MEXICAN TEACHERS' UNION

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*Abstract: This study examines the effect of democratization on a key education reform across three Mexican states. Previous scholarship has found a positive effect of electoral competition on social spending, as leaders seek to improve their reelection prospects by delivering services to voters. However, the evidence presented here indicates that more money has not meant better educational outcomes in Mexico. Rather, new and vulnerable elected leaders are especially susceptible to the demands of powerful interest groups at the expense of accountability to constituents. In this case, the dominant teachers' union has used its leverage to exact greater control over the country's resource-rich merit pay program for teachers. It has exploited this control to increase salaries and decrease standards for advancement up the remuneration ladder. The evidence suggests that increased electoral competition has led to the empowerment of entrenched interests rather than voters, with an overall negative effect on education.*

In the wake of significant study of the politics of economic liberalization and democratization in Latin America, scholars have increased their attention to social policy reform. Higher levels of inequality and inconsistent economic returns have highlighted the key roles of public education, social security, and health care in the process of economic development. Conventional wisdom and some evidence suggest that economic opening has had a negative effect on social policy provision by increasing fiscal constraints on governments (Garrett 2001). At the same time, many scholars expect democracy and competitive electoral contexts to foster greater social investment due to the pressure that constituents place on their elected leaders. Indeed, an array of analyses has shown that increases in the level of democracy are associated with greater public spending on health, education, welfare, and social security (Brown and Hunter 1999, 2004; Kaufman and Segura-Ubiergo 2001; Stasavage 2005; Hecock 2006; Ansell 2008). Though these studies caution that increases in resources do not automatically translate into improvements in quality, certainly more money is preferable to less.

Understudied, however, is the extent to which policy makers are able to effectively channel these resources and improve social policy outcomes. In many new democracies, citizens have expressed deep dissatisfaction regarding government performance (Lagos 2008). Much of this can be attributed to unreasonably high expectations in the wake of economic turmoil and deteriorating authoritarian regimes. And, of course, democracy is messy. The nature of the legislative process

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amid competing leaders, parties, factions, and interests is slow and not conducive to the rapid rewards that were often expected to come with democratic transitions. However, much more pernicious is the potential vulnerability of newly elected leaders to pressure from powerful societal interests for special treatment, especially in the context of new and fragile democratic institutions.

This study examines the process of a major public education reform in Mexico in the context of that country's democratization. Among social policies, education is particularly important for enhancing the prospects for equitable economic development in Latin American countries. Increasing the quality of education leads to tangible improvements in the lives of individuals and their families as well as broad social and economic gains in the community (McMahon 1999). But public education is notoriously difficult to reform. The challenges certainly include identifying and designing policies that will lead to higher student performance. Often ignored, however, are myriad political obstacles to the implementation of the "best" policies. Ideological predispositions toward particular policy sets and curricular content can lead to partisan fights over process; societal groups may have divergent approaches to reform (anti-tax business interests versus pro-sending parents, for example); and interests vested in the status quo can be especially entrenched in this sector (Corrales 1999). An analysis of policy reform of the education sector is thus well poised to examine the vulnerabilities of newly elected leaders.

In the late 1980s Mexico began implementing market-oriented economic reforms. Simultaneously, the country was undergoing a process of political liberalization, culminating in the election of Vicente Fox in 2000, the first president from a party other than the Revolutionary Institutional Party (PRI) in more than seventy years. In the early 1990s, reform to primary and secondary education that had begun in the 1970s was revived in earnest with the National Agreement for the Modernization of Basic Education (*Acuerdo Nacional para la Modernización de la Educación Básica*). The powerful teachers' union was significantly involved in the process of designing and implementing reform, even as democratization began to change its long-lasting corporatist relationship with the state. One of the hallmarks of the agreement was a strong merit pay program for teachers, a pay-for-performance policy that is ordinarily resisted by unions. As I will show, however, its successful passage at the national level paradoxically demonstrates the strength of the union relative to weakening democratic leaders. Furthermore, a comparison of the process of implementing merit pay in the 1990s in three Mexican states with varying levels of electoral competition further reveals the weakness of leaders in new democracies vis-à-vis entrenched special interests. In privileging accountability to these interests instead of to voters, the immediate effect of democratization on the quality of social services appears to be negative.

#### DEMOCRACY AND CIVIL SOCIETY

The expectation that democracy leads to greater government investment in popular programs is as intuitive as it is attractive. Leaders who owe their jobs to an electorate should do all they can to be reelected by delivering the policies

preferred by a majority of their constituents. Since in Latin America most people are poor, these policies should include a variety of publicly administered and government-supported social safety nets and services. In testing this hypothesis, studies of social spending in general, and education and health expenditure in particular, have consistently found democracy to be associated with greater public outlays (Brown and Hunter 1999, 2004; Kaufman and Segura-Ubierno 2001; Stasavage 2005; Hecock 2006; Segura-Ubierno 2007; Ansell 2008). As these authors acknowledge, however, while increases in spending presumably have positive impacts on programs' quality and coverage, these quantitative analyses are unable to assess the effectiveness of these resources or the efficiency with which they are employed.

Complicating the potential relationship between program quality and expenditure is the assumption that the best route to reelection is to provide material benefits to constituents. Even in established democracies this is far from always the case. In considering education, in particular, certainly large portions of the electorate in Latin American countries would like to see progress; poor people are acutely aware of the rewards of improved education for themselves and their children. But parents are rarely experts in education, and they therefore lack the information necessary to ascertain the appropriateness of policy changes and allocation of new resources. Furthermore, the effects of real education reform are difficult to achieve and are likely to be seen some considerable time in the future. This complicates voters' assessments of leaders' accomplishments and skews leaders' incentives.

Especially in a public policy sector with such a long time horizon, leaders are likely to view reelection as depending not on improving education but on being perceived as improving education. Rather than the drudgery of technocratic improvements and protracted fights with vested interests, self-interested elected leaders are likely to prefer highly visible but more cosmetic demonstrations of their commitment to improving education. However, while enhanced classroom and athletic facilities, for example, may be conducive to ribbon-cutting ceremonies, they fail to address the substantial shortcomings in the quality of public education that are endemic throughout most of Latin America.<sup>1</sup>

Among social groups interested in education reform, there are three main candidates: business groups, parents' groups, and teachers' unions. Business groups may prefer higher-quality education in order to have a more productive base of potential employees from which to draw. Their enthusiasm is likely tempered, however, by an aversion to the taxes required to support improvements. In the Latin American context, the prevalence of demand for low-skilled labor may also dampen the dedication with which business interests lobby for education reforms.

Parents' groups should clearly support improvements to public education.

1. In Mexico, there is no reelection to any office. However, parties and party leaders do seek to hold power in successive elections, and they have sufficient control over their members (who, after all, need leaders to help them find new positions after their terms expire) to coerce them to act for the future electoral benefit of the party. This structure makes leaders behave as though reelection is permitted even though it is not (see Cleary 2007).

Their power, however, is likely diminished for several reasons. Collective action problems associated with large, heterogeneous groups should make parents' organizations particularly susceptible to free riders, undermining active membership. Furthermore, resource shortages are especially acute among parents of students in schools serving poor communities; in much of Latin America, this is exacerbated by flight to private schools of the children of wealthy families. Finally, though active parents may be more informed than the general population of parents, they still lack expertise to determine comprehensive solutions for underperforming schools.

For several reasons, teachers' unions are likely to be particularly successful in influencing education policy. Through coercion and selective incentives, collective action is far easier for unions than for parents' groups. Furthermore, this group certainly has expertise, and as respected, learned members of their communities, individual teachers also have credibility in conveying the value of any particular reform to the constituents whose votes elected leaders are seeking (Corrales 1999). Finally, and because of teachers' social standing, strikes and protests are likely to be especially powerful tools for a teachers' union, as society's sympathy is apt to lie with the teachers. Most leaders will likely try to avoid a political environment in which teachers publicly criticize incumbents and lead strikes as elections approach.

Mexico's process of democratization largely occurred during the 1980s and 1990s. Having controlled every level of government since the 1930s, the PRI's one-party rule ("the perfect dictatorship," according to Peruvian novelist Mario Vargas Llosa) began to face challenges in some state and local elections in the 1970s and 1980s from the conservative National Action Party (PAN). The debt crisis of the 1980s saw economic recession and high unemployment, which culminated in a near victory at the presidential level in 1988 by Cuauhtémoc Cárdenas and the party that became the Democratic Revolutionary Party (Partido de la Revolución Democrática, PRD).<sup>2</sup> Increased competition from both opposition parties at the subnational level in the 1990s was complemented by the PRI's loss of majority control of the national congress in the 1997 midterm elections and the election of the PAN's Vicente Fox as president in 2000.

Throughout its tenure, the PRI's relationship with organized labor was structured around state corporatism through which it sought to harness societal interests by incorporating them into the state apparatus (Collier 1992). This was advantageous to the PRI in many ways (in terms of social control, electoral support, patronage, and so on), but such a privileged position within the power structure also benefited the unions (the leadership, if not always the rank and file). As the PRI weakened in the context of increased electoral competition, the general effects on unions' power and their relationship with the state remain unclear. As I will argue, however, the Mexican teachers' union (the Sindicato Nacional de Trabajadores de la Educación, or SNTE) has become even stronger in the new

2. Though it has not been proven, most analysts and much of the Mexican public accept that this election was fraudulent, a perception largely corroborated by outgoing president Miguel de la Madrid's autobiography (2004).

democracy than it was under the protection of the authoritarian regime. It has done this by exploiting the weakness of electorally tenuous new leaders. The process of the construction and implementation of the merit pay program for teachers and administrators highlights this.

#### MERIT PAY

In most public school systems in the world, teachers are compensated almost entirely on the basis of professional credentials and seniority. Merit pay programs, however, reward teachers according to several other indicators of teaching performance. These might include evaluations by supervisors, teacher exams, and student testing in addition to credentials, professional development, and seniority. Certainly such programs are intuitively attractive: of course better teachers should be paid more, and such incentives should clearly increase the overall quality of education.

With mixed results, the bulk of the literature on merit pay consists of empirical studies of the efficacy of the policy and its variants (see for example Cooper and Cohn 1997; Dee and Keys 2004; McEwan and Santibáñez 2005; and Santibáñez et al. 2007). Another strain of scholarship, however, examines the politics of merit pay and the reasons why it is so rarely implemented (Murnane and Cohen 1986; Ballou 2001). In general, while merit pay as a concept appeals to teachers, virtually all metrics that are utilized in assessing merit are highly unpopular (standardized testing of students, teacher testing, supervisor evaluations, and so on). Furthermore, those most likely to lose in a merit-based system—senior teachers—are also best positioned to resist its implementation. Teachers' unions are therefore generally opposed to merit pay, and it is expected that the stronger the union, the less likely the adoption of merit pay (Ballou 2001). On its surface, this makes the Mexican case particularly puzzling. The teachers' union counts well over a million members and is the largest and arguably the most politically potent union in Latin America (Arnaut 1999). Yet Mexico's comprehensive merit pay program has not only endured since its initiation in 1993 but strengthened, both in the number of participants and the extent of the merit pay administration's authority. As I outline below, the implementation of the substantial merit pay program in Mexico is paradoxically a result of the strength of the teachers' union.

#### *The Union-Government Bargain*

The 1992 agreement between Mexican state governments, the National Education Ministry (Secretaría de Educación Pública, SEP) and the teachers' union had three main components. First, in the largest project of decentralization in modern Mexican history, the Education Ministry transferred administrative authority over education to the states. Second, the ministry underwent significant curricular reform. And finally, a comprehensive merit pay program was introduced, called Carrera Magisterial (Lopez-Acevedo 2004).<sup>3</sup>

3. Carrera Magisterial roughly translates to Teacher Career Ladder (McEwan and Santibáñez 2005).

The program of decentralization faced substantial opposition by the teachers' union (see Murillo 1999; Grindle 2004a, 2004b). It was certainly a reasonable fear among union leaders that decentralization would significantly dilute their power, as their demands would now have to be presented to thirty-two subnational governments rather than to a single national ministry. Though allied with the PRI, the teachers' union could use its considerable power against it in order to oppose decentralization.

However, a confluence of factors led to the eventual passage of the National Agreement despite initial and theoretically anticipated opposition by the union. First, a power struggle within the union in the late 1980s created an opening for the administration of newly elected president Carlos Salinas to effect change in the position of the union. Carlos Jonguitud Barrios had been the leader of the teachers' union since 1972.<sup>4</sup> He was renowned for his autocratic and mafiaesque strategies in achieving significant political power for himself and for the union and in strengthening the relationship of the union and the PRI. Despite this friendliness, under Jonguitud Barrios the fulfillment of the plans of Salinas and many technocrats within the Education Ministry to decentralize education seemed unlikely. The recession of the 1980s had placed fiscal pressures on the Mexican government. A lack of salary increases combined with inflation had led to a severe drop in the real wages of teachers. This contributed to a perception among many teachers that neither the PRI nor the union was protecting their interests (Cook 1996).

In this context, a dissident faction that had emerged within the union beginning in 1979, the National Coordination of Education Workers (CNTE), regained the strength and national presence it had seen in the early 1980s (Grindle 2004b, 292; Cook 1996, 266). It demanded an increase in wages and a "democratization" of the authoritarian SNTE. Jonguitud Barrios responded by essentially banishing all dissent from the SNTE. This only strengthened the resolve of the dissidents, and soon after Salinas took office in 1988, there was massive teacher unrest. In early 1989 a strike of half a million teachers gained considerable popular support (Grindle 2004b, 293–294; also see Cook 1996, 268–271; Loyo 1997, 36–39).<sup>5</sup> Salinas took this opportunity to demand the resignation of Jonguitud Barrios and install an ally, Elba Esther Gordillo. A strong economy and significant annual wage increases for teachers between 1989 and 1991 reduced discontent among the dissidents. A successful midterm election for the PRI in 1991 further strengthened the position of the president and his reformers (Grindle 2004b, 295–296).

Gordillo was certainly an ally of Salinas, as she owed her position largely to his removal of Jonguitud Barrios. It was clear that together they were intent on implementing major reforms that had seemed far out of reach only a few years earlier. That said, Gordillo was gaining power relative to the elected government. Though the PRI leadership was in a better position than at the end of the 1980s,

4. His official tenure as leader was from 1974 to 1977, but his leadership began with the occupation of the SNTE offices in September 1972, and after his term as leader, he remained the central figure of the union until 1989 through his control of the *Vanguardia Revolucionaria* organization within the SNTE (Cook 1996, 72–73).

5. Also see the extensive work on the subject by Susan Street. For an article-length treatment of this period, see Street 1992.



it was experiencing major challenges throughout the country and faced the very real prospect of increasingly competitive elections. It thus could not afford a protracted conflict with the union. Furthermore, Gordillo proved to be particularly adept at strengthening the union's position. For example, she established a think tank, the SNTE Foundation for the Culture of the Mexican Teacher, which was staffed with a panel of experts that lent credibility to the union position during negotiations (Grindle 2004b, 297). The union under Gordillo was able to negotiate a significant across-the-board salary increase in exchange for its support for the National Agreement for the Modernization of Basic Education.

With major ramifications, the union was able to design and co-opt large portions of the merit pay program. In order to reduce the effects of decentralization on the bargaining power of the national SNTE, the National Agreement included annual salary negotiations at the national level between the Ministry of Education and the SNTE through the merit pay program, Carrera Magisterial. This seriously allayed one of the SNTE's main concerns about decentralization. Though SNTE was forced to cede control over a large portion of teacher testing to an insulated, centralized subministry, it was able to win support for permanent promotion. That is, once a teacher qualifies for a pay increase due to performance, the raise cannot be rescinded (Santibañez et al. 2007). Further, the union was able to win a concession that would include a separate merit pay track for administrators, despite resistance from the Ministry of Education amid questions as to the effects on improving instruction quality (Ornelas 2002). Finally, the administration at the national level is dominated by PRI "dinosaurs" and union heavyweights, and the union was thus able to maintain control over significant aspects of the promotion of its members, leaving open the possibility of a vast resource of patronage and political control (Ornelas 2004, 411; Loyo 1997, 51–52). Indeed, terms were so favorable by the end of the negotiations for the National Agreement that Gordillo and the union demanded the inclusion of merit pay as a condition of their support (Ornelas 2002, 141–142). Thus, rather than union resistance to merit pay, its adoption in Mexico demonstrates the extraordinary strength of the teachers' union there. In the years since passage of the National Agreement, elected leaders have grown less and less able to wield the policy authority that the PRI enjoyed in its prime, while the union's power has only grown. Nowhere is this more obvious than in its control over merit pay.

Nevertheless, this combination of a national merit pay program and administrative decentralization had some interesting effects. While the merit pay program is controlled nationally, decentralization (as well as the practicality of dealing with more than a million teachers in the evaluative process) required that there also be state-level administrations. Some states' education ministries have done this well, and others have not. In all cases, merit pay is highly politicized, and largely because of the permanence of pay bonuses, it is unlikely that it produces the types of improvements that proponents envisioned.<sup>6</sup> Rather, it func-

6. For a thorough analysis of the effects of Carrera Magisterial on education quality, see Santibañez et al. (2007).

tions largely as a means to increase the pay of teachers and administrators and serves as a potential patronage tool to strengthen the position of union leaders. Nevertheless, an analysis of three states demonstrates that two main variables condition the way in which the politics of merit pay unfolds: electoral competition and union divisions.

### *The Structure of Carrera Magisterial*

There are three categories of workers within the merit pay program: teachers, school principals, and those in other administrative or technical support roles. The scale of evaluation is similar for all three. This scale has seen some modifications over the life of the program, but between 1999 and 2011 it had six categories of evaluation with one hundred possible points (Santizo Rodall 2002; SEP 1998; SEP 2001):<sup>7</sup>

- Seniority—10 points
- Degrees attained—15 points
- Professional development—17 points
  - Federal training courses—12 points
  - State training courses—5 points
- Professional expertise (teacher testing)—28 points
- Supervisor evaluation—10 points
- Student testing—20 points

Some of the material to tally individual teachers' scores is gathered nationally and some by state officials. The latter is sent to the national office for final scoring. Totals are then sent to the state offices with the recommendation that teachers with scores under 70 points should not receive promotion (McEwan and Santibañez 2005).<sup>8</sup> States overwhelmingly comply. There is significant variation among states, however, as to the percentage of teachers scoring above 70 that gain promotion. Furthermore, within this subgroup, there is very little correlation, in some states, between score and promotion, indicating that something other than score is a key determinant of promotion (McEwan and Santibañez 2005).

There are five levels of promotion, and raises are significant and permanent. A teacher who has achieved the first level receives 24.5 percent more than the base wage for teachers. One who has reached the top level receives nearly 300 percent of the base wage (McEwan and Santibañez 2005; Ortiz Jiménez 2003). Approximately two-thirds of teachers participate in the merit pay program. Of those, roughly 60 percent are at the first level and 85 percent are at the bottom two levels. Fewer than one in every two thousand teachers and administrators reach the highest level.

7. In 2011, the scoring rubric was changed significantly to heavily favor student performance. Fifty of the 100 points are now awarded based on the results of student testing.

8. The program differentiates between "incorporation" into the program and "promotion" to subsequent levels. In practice, there is a pay increase that comes with incorporation (as with promotion), and the requirements vary little between the two forms of advancement (see McEwan and Santibañez 2005; Santibañez et al. 2007).



## CARRERA MAGISTERIAL IN THE STATES

The three cases presented here—Puebla, Michoacán, and Guanajuato—were chosen following the logic of most similar research designs (Przeworski and Teune 1982). The location of these states in the central region facilitates the control of historical and cultural factors and eliminates problems of comparing the very different states in the industrial north and the relatively depressed south. Furthermore, all three cases are roughly similar in population and gross domestic product per capita (INEGI 2005).

They differ strikingly, however, in terms of the key variables. First, political competitiveness has been high in Michoacán and Guanajuato and low in Puebla, which until the most recent (2010) elections continued to be dominated by the PRI. Thus, in a sense, these states represent variation in the level of democracy. Additionally, the electoral competition that exists in Guanajuato is between the PRI and the PAN, while in Michoacán it is between the PRI and the Democratic Revolutionary Party (PRD).<sup>9</sup> Second, the political dynamics of the teachers' union are distinct across these three states. In particular, the strength of the dissident CNTE faction of the union is high in Michoacán and low in the other states. Finally, the merit pay program functions without broad contention in Puebla and Guanajuato, whereas in Michoacán it is highly conflictual.<sup>10</sup> While it is true that merit pay was initiated nationally in 1993, state-level implementation varied significantly in scope, quality, and the speed with which the program gained institutional capacity. Taken together, this research design controls for structural conditions and focuses attention on the union, the government, and the strength of democracy.

The evidence itself comes primarily from interviews with current and former administrators, teachers, union officials, and academic experts. I offered anonymity to my interview subjects in order to protect them from possible reprisals and to elicit sincere answers. However, national Carrera Magisterial officials refused my repeated requests for data that analyze the performance of the state administrations. Thus, I am unable to corroborate the qualitative evidence with empirical indicators.

*Guanajuato*

Guanajuato is northwest of Mexico City. Its economy is more industrial than the other two states, and it is slightly wealthier. It is socially conservative and has long been a source of strength for the PAN. Economically and politically it shares characteristics with many states in the northern part of the country. In general,

9. The 2011 gubernatorial elections in Michoacán saw a substantial increase in the success of the PAN, whose candidate was the sister of President Felipe Calderón, Luisa María Calderón.

10. It should be reiterated that its uncontentious administration in Puebla and Guanajuato does not mean that the merit pay program improves teaching or education quality. Indeed, the evidence that exists suggests that it does not (McEwan and Santibáñez 2005; Santibáñez et al. 2007). Furthermore, in all cases the program is administered in a way that strongly suggests it is much more about resource control than it is about education.

the education system in Guanajuato functions well relative to some other states, and it has been successful in implementing merit pay without much contention. At first glance, one might attribute this to the successful governance of the PAN, which is perceived to have had policy achievements across the board in states it controls. A closer examination, however, reveals that the union is the overwhelming factor affecting the smooth operation of the merit pay program.

Before the emergence of the PRD in the late 1980s, the PAN was the primary opposition party to the dominant PRI at all levels of government. The PAN is characterized both by social conservatism and by its friendliness to business. Though initially weak at the national level, it gradually gained inroads subnationally, principally in the north. Guanajuato has long been one of its strongholds, and electoral competition in the state is high between the PAN and the PRI. Indeed, Vicente Fox, the president of Mexico from 2000 to 2006 and the first president from a party other than the PRI in more than seventy years, is a former PAN governor of Guanajuato.

It is tempting to attribute the implementation of merit pay in the state to the ideological predilections of the PAN and to the high level of competition between the two parties. Certainly it would be expected that the business-oriented PAN would champion a merit-based pay structure that is similar to what it sees in the private sector. Furthermore, electoral competition has been fierce for well over a decade, and it would be expected that leaders in this situation would be clamoring to present and implement programs popular with their key constituencies or the electorate more broadly.

In a state that had long been governed by the PRI, the 1991 gubernatorial elections saw protests amid widespread accusations that electoral fraud led to the victory of the PRI candidate, Ramón Aguirre, over the PAN's Vicente Fox (in his first, unsuccessful bid for the office) (Asman 1991; Camacho Sandoval 2004, 203–204). Soon afterwards, PRI president Carlos Salinas forced Aguirre to resign and appointed the PAN mayor of León (Guanajuato's largest city), Carlos Medina Plascencia, who served until Fox's election in 1995. Under Medina Plascencia, the government demanded accountability of teachers who were grossly unproductive or who had committed crimes such as child abuse and molestation—teachers who had previously been protected by the union.<sup>11</sup>

Indeed, one former high-ranking official in the state's Ministry of Education described the type of systemic abuse and corruption that had been overlooked previously. In one instance he was sent to investigate student protests at a rural school. He discovered that the principal had been running a school store where students were required to buy all supplies, uniforms, and lunch, and was making approximately US\$8,000 per month, more than ten times the salary of a principal. Other previously overlooked offenses included child molestation, absenteeism, and being paid two salaries while working only one job.<sup>12</sup> Some people, *aviadores*

11. Interview with a former high-ranking official of the Guanajuato Ministry of Education, May 7, 2004, Guanajuato, Guanajuato.

12. Ibid. Many teachers do legally have a *doble plaza* or double shift where they are paid a double salary. They do this by teaching both morning and afternoon classes (each of four to six hours). Though

or “fliers,” were paid a teacher’s salary but were actually functionaries of the PRI or the union (Camacho Sandoval 2004, 228). The same official explained that in previous years, an average of only two out of fifty-two thousand teachers had been fired annually!<sup>13</sup> When the new team arrived, it terminated nearly one hundred in the first year, and the numbers rose in subsequent years. Despite the fact that this was still a very low percentage of all teachers, the union leadership was extremely angry.<sup>14</sup>

Notably, this approach was undertaken prior to the creation of the merit pay program in the National Agreement for the Modernization of Basic Education. There is every indication that the PAN’s policy was driven both by ideology and by an effort to demonstrate that the PAN was an independent, uncorrupt alternative to the PRI. Clearly the union was not happy with these actions, but the Medina Plascencia administration chose to fight the teachers’ union, possibly out of ideological opposition to organized labor and very likely also because it was seen as part of the PRI. Indeed, when Carrera Magisterial was created, it was not championed by the PAN despite the expectation that it would be ideologically attractive to the right because it was a union (and thus a PRI) project. But mostly, according to another high-ranking official, the Education Ministry team fought the union because it was perceived to be standing in the way of improvements to education.<sup>15</sup>

Ultimately there were casualties among ministry officials due to this protracted battle with the union. Most notably, José Trueba Dávalos was asked by the governor to resign as secretary of education in 1993 after widespread protesting by the union. According to Trueba, however, he resigned in order to placate the union and continue the education project to which, by most accounts, he was unusually dedicated.<sup>16</sup> With the union temporarily appeased, Trueba was replaced by Carlos A. Torres Moreno, who had been a longtime member of Trueba’s team and who continued with similar methods.

When Fox was elected governor in 1995, he initially chose to continue the combative approach to the union begun by his predecessor. As he began to seriously contemplate a run for the presidency, however, his attitude toward the

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somewhat controversial due to the perception that teachers are not able to give sufficient attention to either class, this is considered legitimate.

13. In his analysis of teacher governance in Mexico City, Silva Méndez (2010) explains why sanctions of teachers are extremely low throughout Mexico.

14. Interview with a former high-ranking official of the Guanajuato Ministry of Education, May 7, 2004. The purge, as well as an aggressive (in relative terms) focus on “modernizing” education in Guanajuato actually began before the Medina Plascencia administration. The previous PRI governor, Rafael Corrales Ayala (1985–1991), had begun the process through the surprise appointment of a nonpartisan figure with little administrative experience, José Trueba Dávalos. Trueba was given wide latitude by the governor, who, according to Trueba, basically let him do what he wanted (Fierro Evans and Tapia García 1999, 159–160; Camacho Sandoval 2004, 224–228). Medina Plascencia was so impressed with Trueba and his team that he asked him to stay on and ratchet up his program of modernization.

15. Interview with a former high-ranking official of the Guanajuato Ministry of Education, May 18, 2004, Guanajuato, Guanajuato. See also Fierro Evans and Tapia García (1999, 169).

16. Second interview with an educational system historian at the Universidad de Guanajuato, June 2, 2004, Guanajuato, Guanajuato; also according to an interview with Salvador Camacho Sandoval, as quoted in Camacho Sandoval (2004, 240).

union changed. Fox began to make alliances with the union at the national level, and this led to an easing of tensions between Fox and the union in the state as Fox grew more conciliatory.<sup>17</sup> According to both current and former Education Ministry officials, along with teachers and academics, it became clear to this administration that the union in Guanajuato could be a significant obstacle both to Fox's national political ambitions and to the continued electoral success of the PAN in the state. Rather than fight the union and suffer the considerable political consequences (through strikes, protests, and general political combat), Fox and the PAN withdrew from the education sector and ceased its aggressive attempts to improve it.<sup>18</sup>

Fox had also established a political alliance with Gordillo through their involvement in the Group of 100 (also called the San Angel Group), which was an association of Mexican intellectuals and power brokers established by Jorge Castañeda, a prominent sociologist and future foreign minister under President Fox (Pardinas 2004, 77). Many Guanajuato academics, teachers, and some education officials assume that Gordillo used her influence to make sure Fox's relationship with the union was smooth and would not affect his presidential chances, and that he was careful to concede power to the union in exchange for Gordillo's support.<sup>19</sup> A historian who has focused on the history of education in the state explained that Fox simply allowed the union to capture municipal education administrations. Fox reportedly also asked the union leadership to deal directly with him, bypassing the state's minister of education.<sup>20</sup> Later, Gordillo and Fox maintained a good working relationship throughout his presidency, despite coming from different parties; this adds credence to the assumption of a mutually beneficial association. This amiable relationship between the union and the PAN in Guanajuato persisted into the administration of Juan Carlos Romero Hicks, who was elected in 2000.<sup>21</sup>

Thus, the deterioration of the ties that bound together the union and the PRI in Guanajuato was ultimately replaced with a relationship between the union and the PAN that permitted the union to continue its high-level role in the government. The PAN's precarious electoral situation, along with Fox's broader political ambitions, led it to capitulate almost completely to a union traditionally linked to the opposition, which could have otherwise presented a serious threat to its

17. Interview with a university specialist in the politics of education in the state of Guanajuato, May 1, 2004, Guanajuato, Guanajuato. Also interviews with former Guanajuato Ministry of Education officials, May 7 and 18, 2004.

18. It may very well have been the case, furthermore, that the SNTE decided such an arrangement in a state trending toward support of PAN was preferable to working to sabotage the PAN on behalf of the PRI, such that the union not only refrained from punishing the PAN but actively supported it. Certainly, this was the perception of those of Trueba's team that remained, some of whom had initially been optimistic about the incoming Fox administration (interview with a university specialist in the politics of education in the state of Guanajuato, May 1, 2004; and interviews with former Guanajuato Ministry of Education officials, May 7 and 18, 2004).

19. Interview with a university specialist in the politics of education in the state of Guanajuato, May 1, 2004; and interviews with former Guanajuato Ministry of Education officials, May 7 and 18, 2004.

20. Interview with an educational system historian at the Universidad de Guanajuato, June 2, 2004.

21. Interview with a high-ranking official of the Sección 13 of the SNTE in Guanajuato, May 26, 2004, Guanajuato, Guanajuato.

continued success at the polls. The union, free to do what it wanted, focused on programs dear to it, especially the resource-rich merit pay program.

### *Puebla*

The case of Puebla strengthens this argument. Puebla is similar in size to Guanajuato and is located just southeast of Mexico City. Its higher-education institutions are noted around the country for their high standards, but the quality of its primary education and its administration is about average for Mexico (INEE 2004). Politically, until the gubernatorial elections of 2010, the level of partisan electoral competition remained low under continued PRI dominance. In Puebla, the merit pay program was implemented without contention, and it appears to be largely controlled by the union. In contrast to Guanajuato, however, this has been a function of the historic corporatist relationship between the PRI and the teachers' union.

In many ways, one could view Puebla as politically characteristic of the "old" Mexico when the PRI dominated. In this sense, its inclusion in the study provides an opportunity to contrast the previous system of national politics with the current one (more of an amalgamation of the recent experiences of Guanajuato and Michoacán). Although support for the PAN has been growing, PRI candidate Mario Marín Torres was elected with a majority in 2004 and by a fifteen-point margin over the PAN candidate. Furthermore, two-thirds of the seats in the state legislature are currently held by the PRI (CIDAC 2010). Thus, the state's administrative body for merit pay was given priority. Indeed, the groundwork for merit pay administration in Puebla began even before the final agreement of the National Agreement for the Modernization of Basic Education was made.<sup>22</sup> Soon afterwards, Manuel Bartlett Díaz was easily elected governor as the PRI candidate. Bartlett had been the Mexican secretary of the interior for the whole of President de la Madrid's administration from 1982 to 1988, and he had been secretary of education for the first two years of the Salinas presidency, preceding Ernesto Zedillo in the post. So he brought with him to the governorship significant credentials and connections, knowledge of the initial negotiations for the National Agreement, and by some accounts, a genuine dedication to the improvement of education in Puebla. One official at the state Ministry of Education, who seemed especially dedicated to her job, indicated the extent to which Bartlett had supported real educational improvements across the board, despite the fact that he came from the ruling class. This compared particularly favorably to her view of Bartlett's successor, who had been expected to continue the fight for education because of his humble roots, but who had a clientelistic leadership style.<sup>23</sup>

Indeed, Bartlett's administration paid significant attention to the education sector through a traditional PRI lens. Teachers were left with a sense of the government's fair treatment of them and of its support for education in general. As a

22. Interview with a Puebla State Carrera Magisterial official, February 16, 2004. Puebla, Puebla.

23. Interview with a teacher-training official in the Puebla Ministry of Education, February 24, 2004, Puebla, Puebla.

result, there has not been a single significant labor protest by teachers in Puebla since 1995.<sup>24</sup> Most pertinent here, the merit pay program was left to function as the union preferred.

Elected officials do not seem to view the union as an adversary. Virtually everyone with whom I spoke echoed this refrain: the union does not complain, because the government has allowed it to function autonomously. Nearly identical points along these lines were made by a union–Education Ministry liaison, ministry officials, teachers, and academics, as well as federal Education Ministry officials.<sup>25</sup> Notably, merit pay functions without political battles, according to teachers and program officials.

Thus, as in Guanajuato, the union's priorities dominated. However, in Puebla, rather than the union getting its way because of a ruling party afraid of the electoral repercussions of crossing it, the PRI and the union practiced their traditional corporatist alliance. The union has influence and autonomy because it has had the support of the PRI government, and the PRI has faced little challenge from the union in the form of strikes and protests. Whether this relatively harmonious situation will persist in the context of the new coalition-backed governor, Rafael Moreno Valle Rosas, is an open question.<sup>26</sup> The case of Guanajuato suggests that the new governor will not want to press the union, but would this eventual outcome require a period of government-union contestation? One official guessed that there would be more room to maneuver for a new government in Puebla than other places, but if pushed too far, of course, the teachers would fight.<sup>27</sup>

### *Michoacán*

The final case, Michoacán, highlights the extreme negative consequences of the combination of electoral competition, fissures in the union, and union-partisan alignments. The state is located in west-central Mexico. It is a large rural state with a significant indigenous population. It is the leading sender of migrant workers to the United States and consequently receives more remittances per capita than any other state. As a result, much of its economy revolves around services paid for with these funds, while the industrial base stagnates.

The state is widely seen to be lagging significantly behind others in the quality of its administration of merit pay and consistently ranks among the bottom few states in nearly every measure of student achievement (INEE 2004). It was late to implement Carrera Magisterial, and the program remains a low priority, occupy-

24. Interview with a Teacher College official and liaison to the union, February 4, 2004, Puebla, Puebla.

25. Interview with a Puebla State Carrera Magisterial official, February 16, 2004; interviews with a Teacher College official and liaison to the union, and with a Teacher College administrator and professor, February 4, 2004, Puebla, Puebla; and interviews with a teacher-training official in the Puebla Ministry of Education, and with a high-ranking Puebla Carrera Magisterial official, February 24, 2004, Puebla, Puebla.

26. Notably, the coalition includes the PRD, the PAN, and the New Alliance Party (Panal), which is backed by the SNTE.

27. Interview with a teacher-training official in the Puebla Ministry of Education, February 24, 2004, Puebla.



ing a single office several blocks down a dusty street from the campus that houses the state's Ministry of Education. Furthermore, while successful states have decentralized the administration of merit pay under the logic that there is a need to be close to the schools in order to evaluate teacher performance, in Michoacán, everything is directed out of this one office. Teachers from both union factions and some of the more open ministry officials expressed their perception that, even more than in other states, decisions regarding advancement in the program are based on many things, including luck, most of which have nothing at all to do with merit.<sup>28</sup> If you are loyal to the union by engaging in walkouts and protests when you are told, teachers believe you will get your merit pay points, regardless of whether you deserve them.

Michoacán's partisan politics has been shaped by its indigenous, rural heritage and by the fact that it is the home state of the Cárdenas family. Lázaro Cárdenas was president of Mexico from 1934 to 1940 and is widely seen as the father of the modern PRI. He was a popular president who implemented many of the progressive policies of the Constitution of 1917 that had been ignored by his predecessors. His son Cuauhtémoc Cárdenas created the PRD in 1989 and ran for president several times. Partly as a result of Cuauhtémoc Cardenas's roots in the state, the PRD and the PRI have been the dominant parties there ever since. Demonstrative of the high level of competition between the two parties, Lázaro Cárdenas Batel, Cuauhtémoc's son, was the PRD governor during 2002–2008.

Despite the expectation that electoral competition should force leaders to undertake improvements in order to please their constituents, both education reform in general and merit pay are highly contentious and have been poorly managed. Some perceive that the PRD has turned out to be much like the PRI in its position of leadership. Very quickly it seems that it has forgotten its criticisms of its opponent and governed like the PRI, as though it were entrenched, even though it is not.<sup>29</sup> This perception was widespread among many people with whom I had casual conversations, and this certainly serves as an anecdotal challenge to the hypothesis that electoral competition directly breeds responsive governments.<sup>30</sup> However, this could have much more to do with where power lies among constituencies. Parents and students are certainly outraged at the low quality of education in the state, though they seem not to be punishing the government at the ballot box. But clearly the teachers' union is among the most powerful groups in the state, and leaders seem to strive to appease it. It is here, in interactions between the union and partisan electoral competition, that the determinants of the highly conflictual educational environment can be found.

The union situation in Michoacán is far from straightforward. Here, the main union (SNTE) and the dissident CNTE are in open conflict. As indicated in the

28. Interview with a national SEP representative in Michoacán, November 24, 2003, Morelia, Michoacán; interview with a teacher and Comité Alterna union member, December 1, 2003, Morelia; interview with a high-ranking Michoacán Ministry of Education official, December 1, 2003, Morelia; and interview with a teacher and SNTE union member, December 5, 2003, Morelia.

29. Interview with a high-ranking Michoacán Ministry of Education official, December 1, 2003.

30. This is consistent with the findings of Cleary (2007, 2010) in his treatments of utility provision across Mexican municipalities.

national story, the CNTE emerged beginning in 1979 in some parts of Mexico as a caucus within the SNTE that was angered by the latter's corporatist ties to the PRI government. Many teachers felt that the leadership of the SNTE was highly authoritarian and had long ago begun to promote the interests of the leadership rather than its members (and often at their expense). Calls were made for the "democratization" of the union. The CNTE's positions corresponded with criticism of the PRI by the *Corriente Democrática*, which came from within the ruling party in the 1980s (Collier 1992, 102). This dissent within the PRI formed the base from which the opposition that became the PRD was built. Thus the criticisms of the SNTE by the CNTE very much mirrored those made by PRI dissidents (and later the PRD) toward the PRI: entrenchment in power and leadership had led to a loss of revolutionary fervor, corruption, a lack of accountability, and inconsistent progress, to say the least (Foweraker 1993; Cook 1996).

In some states, such as Oaxaca, the CNTE largely took over the local union. In others, such as Puebla and Guanajuato, very little dissidence was present. In Michoacán, however, the union was divided into two powerful camps. The result generally has been considerable distrust between the two factions and among its members (often working together in the same schools), and significant resources spent on increasing their relative power. In this quest, the SNTE has allies among PRI leaders and the CNTE has allies within the PRD. Both have sought to increase their power by recruiting new teachers and ensuring that they have the power to employ them. The parties have facilitated this by giving the unions teaching positions to distribute and by allowing greater numbers of students into the teachers' colleges.<sup>31</sup> As a result, there are more teachers than ever before at a time when the population of the state is stagnating as a result of lower birth rates and migration.

There has been significant delay in dedicating resources to the administration of merit pay in Michoacán along with a resultant lack of effectiveness (even by the standards of Carrera Magisterial). This was likely a result of resistance mainly by the CNTE. It (probably correctly) saw the merit pay program as a mechanism of the PRI and the SNTE to regain control in states with a large presence of the CNTE.<sup>32</sup> The members are particularly militant and committed, so it is not difficult for them to rattle the government and the Education Ministry officials by protesting loudly in the streets and having walkouts at the schools. (Michoacán has the lowest number of days in the classroom of any state, according to one official.) However, after the election of Cárdenas Batel as governor, and in the context of the ascendance of the PRD more generally in the state in the late 1990s, the CNTE was able to gain control over the merit pay program. The demand by the national office for its implementation was evidently not going to wane, so as soon as the CNTE was able to it took over the program through appointments made by its

31. Interview with a national SEP representative in Michoacán, November 24, 2003, Morelia, Michoacán; interview with a teacher and SNTE union member, December 5, 2003, Morelia.

32. Interview with a high-ranking Michoacán Ministry of Education official, December 1, 2003; interview with a Pedagogic Technical Support official in the Michoacán Ministry of Education, November 27, 2003, Morelia, Michoacán. Dissidents use adjectives like "institutional" and "neoliberal" to describe the program, terms that they associate with the PRI.

PRD allies. Though under the PRD and the CNTE the program has expanded, the scope of its administration is still quite limited relative to other states.<sup>33</sup>

In Michoacán to a greater extent than in the other cases, many perceive that the program is being used for political purposes in the context of this union rivalry. Indeed, there are accusations that members of the CNTE are being rewarded through the merit pay program for attendance to the union leadership and the governing party, not for teaching performance. It is certainly the case that the national administration has tried to guard against this potential by weighting elements of merit pay that are more objectively measured (student test scores, teacher proficiency scores, etc.) relative to more subjective areas like supervisor evaluations. It has been reported, however, that paperwork tends to disappear and teachers regularly have to resubmit the various parts of their application.<sup>34</sup> There is clearly a sense that teachers earn their perks, in merit pay and otherwise, by pleasing the union leadership. In interviews, teachers reported that it is much more advantageous professionally to skip class to attend a protest at the behest of the union than it is to attend a training workshop.<sup>35</sup> And there is every incentive for one faction of the union to do everything it can to advance the careers of its members for fear that they might otherwise defect.

What we see in Michoacán is a legacy of the fact that corporatism in Mexico stems from union relationships with a single party and not with the government more generally. As democratization occurred and elections became competitive (and the government became less intertwined with the PRI), the SNTE remained allied with the PRI, despite PRD election victories. Had the SNTE faced no competition, perhaps it would have shifted its alliance to the PRD, as it did to the ruling PAN in Guanajuato. However, the CNTE was already a natural partner to the PRD. Both the dissident party and the dissident union took advantage of this partnership to combat their respective rivals, and much of the battlefield has been the education sector. The results for merit pay (and unfortunately many other aspects of primary education in the state) are negative, both in the success of implementation and the quality of the program.

## CONCLUSION

The Mexican teachers' union is not a typical union, nor even a typical teachers' union. It is certainly not the purpose here to cast aspersions on the rights of teachers to organize in defense of their rights. Yet the SNTE's legacy as a corporatist union with deep-seated links to the corrupt, authoritarian, one-party rule of the

33. Interview with a high-ranking Carrera Magisterial official in the Michoacán Ministry of Education, October 23, 2003, Morelia, Michoacán.

34. It is understandable that a program in Mexico would be particularly vulnerable to such tactics as the level of bureaucratic red tape is quite high throughout the country—citizens often must have forms with original signatures, in triplicate, with the correct official seal, and so on.

35. Interview with a teacher-training official in the Michoacán Ministry of Education, October 22, 2003, Morelia, Michoacán; interview with a national SEP representative in Michoacán, November 24, 2003, Morelia; interview with a teacher and Comité Alterna union member, December 1, 2003, Morelia.

PRI has endured. It is an opaque, allegedly corrupt organization that engages in clientelism and the politics of power, and its dedication to improving education appears to be low on its list of priorities.<sup>36</sup> However, the point here is that it is a powerful special interest.

Many unions suffered in the context of economic reforms that expanded the labor pool beyond national borders. The education sector has been shielded from these effects due to the impracticality of outsourcing schools internationally. Democratization weakened government leaders and ruling parties as they began to have to compete in elections in order to keep their positions. In the SNTE, tenuous leaders met an organization that had lost none of its institutional power. At the national level, it was largely able to dictate the conditions of the education reforms of the early 1990s and to maintain predominant control over the resource-rich merit pay program. At the state level, its power varies. The story of merit pay implementation, however, strongly suggests that democratization did not increase the prospects of meaningful educational improvements.

There are certainly limits to what can be said based on the state-level evidence presented here. The institutional capacity of Carrera Magisterial and the extent to which it is influenced by the union are difficult to measure quantitatively, and the data that do exist are closely guarded. This is further complicated because the education sector is highly politicized. The merit pay program in particular involves many resources, significant political power, and a notoriously corrupt union, and those who control the program are in a position to shield information from the public. Yet precisely because of this obfuscation, these political processes require attention.

The qualitative evidence presented here indicates that merit pay implementation has been fraught with problems that have severely limited the expected benefits of merit pay programs. In Puebla, continued PRI dominance led to union control much as it had during the old days of corporatism, with a marked preference for the status quo. In Guanajuato, an initially adversarial relationship between the PAN leadership and the union ultimately gave way to union control of merit pay, as elected leaders recognized the political dangers inherent in antagonism of the SNTE. The case of Michoacán represents the one thing worse than an entrenched, corrupt union facing weak elected leaders: a perfect storm of a divided, warring union whose fissure correlates almost exactly with the one between the two competitive political parties. The results have been disastrous for the process of implementing merit pay, as well as for many other aspects of education.

Certainly the wave of democratization that occurred in Latin America in the last decades of the twentieth century was a positive development. It put an end to regimes that were often brutally repressive and that circumvented the rights of citizenries to determine their future. Democracies can provide substantive im-

36. This is not at all to say that Mexican teachers are not dedicated to their students and to their craft. In my research I have witnessed many teachers and administrators who work tirelessly in an effort to provide their students with the best possible educational opportunities and to improve the education system more broadly. I can only marvel that they make this extraordinary commitment in an environment that is often bitterly political and fraught with personal and professional risks.

provements in the lives of people in many ways. But clear dissatisfaction with the fruits of the transition exists in much of the region and is not only the result of unreasonable expectations. Newly elected leaders and parties occupy vulnerable positions. They are often tasked with managing extraordinary problems in the context of weak institutions. The presence of long-term, powerful, and entrenched interests makes governing particularly difficult. The best way to retain leadership is rarely to engage in bold reform campaigns, but to placate interests and merely appear to be effective.

Unfortunately, this study paints a fairly bleak picture of the prospects for education reform in Mexico. While we will likely see continued increases in resources devoted to education (a long-term, and often successful demand of the union), this will not quickly translate into improvements in education. Especially in the face of well-publicized difficulties associated with drug violence and warring cartels, leaders are unlikely to engage in battle with the union to undertake meaningful education reform. But until this occurs, education in Mexico will continue to stagnate, and young generations will bear the burden.

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