Interests, Institutions, and Reformers: The Politics of Education Decentralization in Mexico

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The political cards were stacked against improving the quality of education in most Latin American countries in the 1990s. Opponents of change—generally unions of teachers and central government bureaucrats—were highly organized, vocal, and politically important. In contrast, beneficiaries of change—parents, local communities, society at large—were dispersed, usually unorganized, and lacking in focused political clout. Moreover, ministries of education were weak when compared to teachers' unions and were frequently colonized by these organizations. The leadership of such ministries was often short-lived and ineffective in the pursuit of policy change. Few political parties were deeply committed to the kinds of reforms that would significantly improve the quality of education. And, throughout the decade, there was little evidence of organized pressure for educational change, although many citizens ranked education high as a public issue.

Despite these daunting political odds, however, a surprising number of countries introduced, approved, and at least partially implemented significant education reform policies during the 1990s.[1] This puzzling political result needs to be explained.

Mexico provides a good case for exploring the introduction of reform in a political context hostile to such an outcome. In the spring of 1992, President Carlos Salinas and his minister of education, Ernesto Zedillo, sat down with the leadership of the Sindicato Nacional de Trabajadores de la Educación (SNTE) and governors of the country's 31 states to sign the National Agreement for the Modernization of Basic and Normal Education.[2] This agreement restructured education decision-making and implementation in the country. After it was signed, 630,000 teachers and administrators and more than 13 million children became the responsibility of the state governments.[3] The reform agreement included a number of other changes in the education system as well, but decentralization was undoubtedly the major achievement of the reformers.

As this paper shows, prior to the 1992 agreement, those opposed to reform were well positioned to resist change. Moreover, there was little in the way of support for significant change in education policies. Political institutions that might have been available to promote reform were weak or controlled by its opponents. Several previous presidents and education ministers—in what was undoubtedly Latin America's most presidentialist political system—had tried to promote decentralization, but all had failed. These failures were laid squarely at the door of the teachers' union and its close alliance with the country's dominant political

party, the PRI. Given the obstacles to change in education policy in Mexico, the 1992 accord would not have been predicted.

Education reform in Mexico was the product of a political administration wedded to the modernization of the country's economy and its rapid insertion into a global system of trade and finance. Yet the reform was not deeply tied to ideas about market-oriented policies nor yet to efforts of a national state to lessen its fiscal burden by decentralizing. This reform was also undertaken at a time when the PRI, which had been politically dominant for decades, was under attack from proponents of a more open and democratic system. In the absence of any mobilized pressure for better schooling for the country's children, however, decentralization cannot be directly tied to the response of political leaders to a more demanding civil society or to current or past electoral contests. This initiative did not grow directly out of either neoliberal concerns of policy makers or democratic demands; rather, the interests and strategic choices of reform leaders were important in how the initiative emerged and how it was designed, negotiated, and put in place.

Of course, efforts to explain the adoption and implementation of reform initiatives in the face of strong opposition and political institutions biased against change often invoke the importance of reform leadership. In some cases, reformers are simply admired as "heroes," "champions," or policy "entrepreneurs" who press ahead with change initiatives by force of personality or conviction despite the political odds against them.[4] In more thoughtful analyses, effective reform leaders are noted for their ability to mobilize high-level political support to offset the opposition of key interests or for their capacity to build coalitions and teams that favor change.[5] In some studies, they promote their ends through the creation of networks and the strategic infiltration of important institutions.[6] In Mexico, reformers acted strategically to alter the nature of the opposition to change and to realign institutions to become more supportive of it. Thus, they sought opportunities to alter the conflict equations that surrounded their proposals and they found moments when it was possible to affect the strength or coherence of the opposition and to alter the existing bias of institutions.

Nevertheless, reform leadership is not a universal panacea for needed, flagging, or orphaned policy changes. Because reformers face particular opponents and act within particular institutions that constrain their actions, they cannot always be successful in the pursuit of change, however strategic they are. As a case in point, the Mexican experience in education reform shows how the objectives of reformers were modified and constrained. While policy changes were being negotiated and then implemented, even the impressive array of political resources controlled by a Mexican president under the PRI regime was not enough to ensure that reformers could fully meet their objectives. There was scope for agency, but at the same time, the space available was narrowed by existing constellations of interests and institutions.

The Roots of Contention

In the 1950s, 1960s, and 1970s, many Latin American countries made major strides in increasing access to education, particularly at the primary level. During that period, schooling was expanded to rural areas and to poor children in mushrooming urban squatter

settlements. These access type reforms were politically popular. They implied efforts to increase education budgets, train and hire more teachers, build more schools, distribute more textbooks, and administer more programs. Although they cost money and required some administrative capacity, these reforms provided citizens with increased benefits and politicians with tangible resources to distribute to their constituencies. They created more jobs for teachers, administrators, service personnel, construction workers, and textbook and school equipment manufacturers. They increased the size and power of teachers' unions and central bureaucracies. In fact, unions of educators were among the principal advocates for broader access to public education and they often worked closely with ministries of education to achieve this goal.

In contrast, the reforms of the 1990s focused primarily on improving educational quality. Quality-enhancement meant addressing the problem of poor management and inefficient use of resources by increasing accountability and allocating responsibilities for performance more effectively. In the most ambitious reforms, states, municipalities, school principals, or local school boards were given responsibilities for hiring, promoting, disciplining, and firing teachers; national ministries were restructured and assigned normative rather than operational roles. New initiatives included efforts to reduce repetition and dropout rates and increase the degree of learning taking place in the classroom. Improved curriculum and changes in pedagogy were also significant. More teacher training and monitoring often went hand-in-hand with efforts to tie salaries to performance and to greater accountability to supervisors or local communities. National standards were an important ingredient of reform in several countries, and they were often implemented through regular examinations of student performance. Some countries also instituted tests for teachers.

Such quality-enhancing reforms, however well designed, meant that jobs and control over budgets, people, and decisions were put at risk. They exposed students, teachers, and supervisors to new pressures and expectations. Not surprisingly, they were far less politically popular than earlier access reforms. Teachers' unions charged that such reform policies destroyed long-existing rights and career tracts. Bureaucrats charged that they gave authority to those who "know nothing about education." Politicians were sometimes reluctant to support them because of the opposition of powerful teachers' unions. Governors and mayors did not necessarily want the new responsibilities they were given. Parents usually did not participate in designing the reforms and often did not understand them. Although public opinion generally favored improved schooling, and reform advocates were frequently eloquent in promoting new initiatives, the politics of putting them in place and implementing them were contentious and difficult, a far cry from the situation faced by promoters of access-type reforms (see Table 1).[7]

Table 1

This kind of political contention characterized the situation Mexican reformers faced in the early 1990s. Like many other Latin American countries, Mexico had done reasonably well in providing access to education to a large portion of the eligible age groups. Between 1950 and 1990, it had reduced its adult illiteracy rate from 43 to 12 percent.[8] Its youth

literacy rate was 96.8 percent.[9] The country reported a net primary enrolment ratio of 100 percent, the highest in Latin American, and its school life expectancy was 11.2 years.[10] Its secondary net enrollment rate continued to lag seriously behind, at 45 percent, but this was a rate that was increasing rapidly.[11]

The much more serious problem in the system was not access to education, but its quality and equity. Although Mexico claimed to spend 3.7 percent of GNP on education in 1990, 12.8 percent of government expenditure, the internal efficiency of education was low. For primary education, 9 percent of students were repeating grades and only 86 percent of enrollees were reaching 5th grade.[12] Its 3rd grade students scored significantly below the Latin American average on tests of language and mathematics and its 4th grade students only slightly above it.[13] Some 15 percent of teachers in the system did not have officially defined qualifications for their jobs.[14]

Inequality was high in the system. While 92 percent of the top decile income group completed primary education, this was true for only 63 percent of the bottom four deciles; 70 percent of the top income decile completed secondary school, while only 10 percent of the lowest 4 deciles did.[15] In 1994, 90.1 percent of urban 14 and 15 year olds had completed primary school; in rural areas, the rate was 67.5 percent.[16] Indigenous children and those living in poor rural areas were those most afflicted by poverty and low achievement in school.[17] A study carried out among 80 schools in distinct neighborhoods the state of Puebla indicates that the quality of school infrastructure was skewed toward urban areas; moreover, those teaching in rural and indigenous schools were likely to have a high school degree at best (see Table 2).

Table 2

Proposals to fix this state of affairs almost always included initiatives to decentralize or deconcentrate the system. The Constitution of 1917 assigned responsibility for primary education to the municipalities and for secondary and normal schools to the states. Although states and municipalities began to develop education systems after the Revolution, the establishment of a national education ministry in 1921 initiated a long process of centralization. The country's most revered educator, José Vasconcelos, spearheaded this process and it was continued without demur until the late 1950s.[18] Vasconcelos was eager to increase access to education throughout the country and he acted in the belief that the states and municipalities were not doing enough to achieve this goal.

In 1928, 20 percent of students were in the national system; by the early 1990s, 76 percent of public school students and teachers and 79 percent of the public schools were part of the national system.[19] At this time, the federal government contributed some 80 percent of the total educational budget. Along with this significant role in financing came a heavy centralization of decision-making. The curriculum and teaching materials were determined in Mexico City, as were decisions about hiring, promoting, and firing teachers, salaries of all personnel, the distribution of funds to local schools, and school location and building activities. Moreover, teacher training became a national concern, and a national system of free textbooks helped cement the central government's role in the curriculum.

One of the primary beneficiaries of the centralization of control over education was the SNTE, which by 1990 had 1.1 million members and was the largest union of any kind in Latin America. The union had long been firmly in support of the ministry's efforts; with centralization, its own power increased. The 1960s and 1970s were also a period of extensive growth in the educational system, and a half million new teachers entered it during the 1970s, each of them duly registered in the union. Thus, during this extended period, the national ministry and the union shared an interest in promoting centralization.

The SNTE concentrated enormous power in the hands of its national executive committee. Traditionally, this committee was an instrument wielded by a powerful boss, the secretary general of the union. It was the only organization in the country that represented teachers and education administrators; their membership was obligatory. Moreover, since its founding in 1943, the SNTE had been closely linked with the Partido Revolucionario Institutional (PRI). As part of the Confederation of Mexican Workers, one of the corporatist pillars of the PRI, the union—not only large but also able to deliver the votes of teachers at election time—was a powerful player in the country's politics and in the maintenance of labor peace. In the late 1980s, SNTE's leader was a national senator; the union controlled 16 seats in the chamber of deputies as well as 42 seats in state-level legislatures and over 100 mayors.[20] The union was also rich, collecting 1 percent of teachers' salaries. It owned department stores, hospitals, hotels, funeral homes, and other businesses.

Indeed, the union was of such size and presence that it had been able to halt government action on many fronts concerned with education and had long dominated the ministry of education by naming people to the most important posts, including several vice-ministerial positions.[21] Through an elaborate patronage system, the SNTE placed and transferred teachers based on their relationship to important people in the union and the party and was able to assist in the assignment of perquisites of office for favored teachers—leaves, loans, and attention from the ministry.[22] Characteristically, school principals, those who headed regional offices of the ministry, and school inspectors were the local arms of the union.

This system was effective in making most teachers dependent on the union. Moreover, many officials owed their first loyalty to the union, not to the ministry. As a consequence, the ministry had a reputation as a large, politicized, and expensive, but inefficient and ineffective, organization.[23] Indeed, the ministry had lost the capacity to manage the teachers and its own affairs, having become a "gigantic and impotent bureaucratic apparatus occupying the major part of its time in tending to internal conflicts and those with the union."[24] The union and the education bureaucracy were thus the primary impediments to education reform, and particularly to efforts to decentralize the system.

Confronting a Legacy of Failed Reforms

Prior to 1990, the politics of education reform in Mexico conformed closely to a scenario of strong opposition paired with weak support and political institutions biased against change. Not surprisingly, any initiative to decentralize the school system, or indeed

to improve the quality of education administration or delivery quickly ran afoul of the SNTE. In an early effort to reverse the trend toward ever greater centralization, in 1958 a reform-minded minister, Jaime Torres Bodet, sought to decentralize administrative functions of the central ministry to the state and municipal levels and to diminish the red tape that characterized the highly bureaucratic system in place.[25] Union opposition defeated this effort in 1959, as it did another ministerial initiative focused on decentralization in 1969.[26]

In 1978, yet another minister of education sought to regain control by the ministry of its own household by creating ministry offices in every state, staffing them with officials whose first loyalty was to the ministry, and giving them responsibility for administration and "non-core" curriculum.[27] It was not long, however, before the union had asserted power over these regional offices and claimed ownership of the directors' positions.[28] A subsequent effort, meant to transfer these state level offices to the state governments, was announced in his 1982 inaugural address by President Miguel de la Madrid. In this case as in the others, union and ministry opposition was strong and the plan was never approved by the congress.[29]

Given the extraordinary presidentialism of Mexico's traditional PRI-dominated system, these failed initiatives were testimony to the power of the SNTE and to its control over the ministry. Union intransigence was particularly notable in the 1980s. At the time, the SNTE was controlled by a self-styled "leader for life and moral guide," Carlos Jonguitud Barrios, whose reign began in 1972, when his Revolutionary Vanguard movement took over control of the national executive committee at gunpoint.[30] Widely believed to use gangster-like tactics in managing the organization and expanding his power and wealth, he was in a good position to do so, given the wealth of the SNTE and its links to the PRI. Government efforts to initiate change in the 1980s created significant tension with the union's leadership at a time when a severe economic crisis was cutting into teacher salaries and benefits and the administration was consumed with efforts to respond to it. Angry primary teachers claimed their wages had declined by 63 percent between 1982 and 1989.[31] "The period between 1978 and 1989 was a period of complete immobility in the relationship between the government and the union—it was a time when nothing could be achieved" because of these tensions.[32]

Thus, on December 1, 1988, when Carlos Salinas became president, he could anticipate that the SNTE, the PRI, and the ministry would all be firmly opposed to any plan to alter the structure, administration, or standards of the education system. The president, however, had reason to pursue such changes. In no small part, his attention to education was due to ongoing conflict with the union and his concern with political unrest. In addition, the president was convinced that improved education would have an impact on the distribution of income in the country—with better education would come better opportunities for generating income.[33] In such a perspective, interest in education reform was derivative of the modernization of the country's economy. The country needed to "reformulate content and methods, maintain a sense of open and modern nationalism, and provide a level of quality that would be competitive worldwide."[34] Moreover, as he admitted some years later, "My mother was a public school teacher," a factor he believed gave him some sympathy for the claims of the teachers.[35]

At the time, however, there was little reason to expect that he could confront the odds against reform in the education sector and be successful. The president faced a significant political dilemma. Salinas' years in government and his prior position as minister of planning and budgeting (1982-88), where he was involved in annual negotiations with the union over teacher salaries and benefits, had given him a good understanding of the problems created by this organization. But the legacy of prior reform initiatives was also a clear reminder of the importance of the SNTE to the management of change. Moreover, without the union, there would be no structure to control the teachers and their demands, a situation inimical to a basic organizing principle of the PRI regime.

Such an assessment was based not only on the demonstrable power of the SNTE and its allies in the ministry, but also on the uncharacteristically weak position of the president after his election in 1988. After a contest that gave him the lowest percentage of votes ever received by a PRI candidate until that time, and one that was surrounded by claims that only fraud, coercion, and violence had ensured his victory, Salinas entered the presidency in an extremely weak position. He garnered a bare 50.7 percent of the vote and the PRI was widely accused of having stolen the election from the Partido Revolucionario Democrático (PRD).[36] Although the PRI maintained its majority in the congress, with 260 out of 500 seats, it did not have enough votes for passing important legislation and constitutional amendments. Indeed, the authority and legitimacy of the PRI-led government was at its lowest point in decades (see Figure 1).[37]

Figure 1

Salinas' situation was not helped by the economic problems that had afflicted the country since 1982; GDP growth in 1988 was 1.2 percent. The public sector deficit was 10.4 percent of GDP and inflation was 114 percent. Real wages were down another 1.3 percent after years of even more significant declines. The external debt reached 100 billion dollars.[38] Added to an increasing crisis of political legitimacy and confidence in the regime, the economic situation further affected support for the PRI government. Public opinion was unusually negative and steeped in cynicism. In 1989, half of respondents in a poll stated that they believed a revolution could be expected within five years.[39] To add to the difficulties, many of the party bosses of the PRI distrusted Salinas and resented the technocratic style he brought into the cabinet and the office of the presidency. Large and important groups of citizens, including the teachers, were deeply angry with the government over declining wages.[40] These were hardly propitious circumstances for undertaking reform.

Before he could tackle education reform, then, the president needed to reassert the traditional power of the Mexican presidency. He did so in short order. Within weeks of taking office, Salinas ordered the arrest of the powerful and corrupt leader of the petroleum workers' union. The notorious and previously untouchable "La Quina" was jailed in a move that was widely seen as a successful flexing of presidential muscle.[41]

The SNTE offered him another opportunity to achieve a similar win. The Coordinadora Nacional de Trabajadores de la Educación (CNTE), a movement of teachers based in the country's southern states, had been formed within the union in 1979 to protest

against general economic conditions, low teacher salaries, lack of internal union democracy, and the close association of the union with the PRI.[42] In 1980, it engaged in a national march and a sit-in, which, at the time, were new strategies for political protest in the country. Throughout the 1980s, even as SNTE gained increasing control over the ministry, the CNTE challenged the government to improve teacher conditions and the union to increase its democratic accountability. Late in the decade, the dissident group claimed a membership of some 300,000 teachers. Just as Salinas took office, the CNTE vociferously demanded changes in government policy and union practices. In the wake of these demands, SNTE's leadership held a national congress in February 1989 and virtually banished dissident voices within the union. In response, the CNTE protested publicly.

In the following months, strikes, mass demonstrations, sit-ins, and marches punctuated the political scene.[43] According to the official record, between February and May, Mexico City experienced "41 marches, 18 meetings, 60 assemblies of union locals, six national assemblies, four forums, two walkouts (one of six hours and another of 17 days), six sit-ins (three covered 15 working days) and 32 sessions of negotiations."[44] CNTE strikers demanded a doubling of their salaries to make up for the bite that austerity and inflation had taken during the past 7 years. In addition, they demanded that the government ensure greater internal democracy in the SNTE, that union boss Jonguitud Barrios be deposed, and that the alliance with the PRI be severed. Ending the reign of Jonguitud, who was accused of masterminding the assassination of at least 150 dissident teachers, primarily in the southern states of Oaxaca and Chiapas, was central to CNTE demands.

As the confrontation between the teachers and the government escalated, a half million teachers participated in a 26-day work stoppage in April; school children throughout the country had an unexpected holiday.[45] In an unusual demonstration of force, parents and university professors joined the teachers in a massive demonstration in Mexico City on April 17. Indeed, the period between February and May was a chaotic one, with the CNTE deeply engaged in protest, the SNTE leadership trying to control it, and the ministry of education condemning it.[46] For the government, the scope of the protest was alarming. On April 1, the president reports having written, "The situation with the teachers is critical. We may go into a state of emergency."[47]

These events raised uncomfortable alternatives for Salinas. Giving in to the economic demands of the teachers would mean the destruction of the Pact for Economic Growth and Stabilization, his plan for overcoming inflation and introducing an array of economic reforms. Moreover, there was danger in succumbing to the demand to depose Jonguitud. Certainly a large and powerful union without a powerful boss could further threaten the already shaky PRI regime. From this perspective, the fact that the CNTE dissidents favored the left-of-center PRD was cause for some alarm. On the other hand, a large and powerful union in disarray and unable to stifle opposition to its boss was equally unsettling.

The president's next actions helped resolve this dilemma in a way that was propitious for future reform, however. On April 23, Jonguitud was called to a meeting with the president and given no alternative but to resign. The once-powerful boss of the union did so

as he left the meeting and his second-in-command soon followed suit. Jonguitud's downfall was widely seen as a successful assertion of presidential power and a message to other unions that might defy Salinas' leadership. Two days later, with presidential blessing, a new secretary general was elected to head the SNTE.[48] Some three weeks after this, the government and the union were able to settle on a 25 percent increase in teacher salaries, which, with the ousting of Jonguitud, was sufficient to send the teachers back to the classroom with some gain, even if far short of what they were asking. Then, in October 1989, Salinas announced the plan for the modernization of the education system in October 1989.

Before moving ahead with this initiative, however, the fractured union had to be brought along. The presidential backing given to Elba Ester Gordillo to be the new secretary general of SNTE was problematic for the newly powerful CNTE. Gordillo had long worked within the leadership group of the union as a close associate of Jonguitud, and, for the dissidents, represented the old guard. Moreover, she was emblematic of the kind of imposed leadership characterizing the presidentialist system that CNTE activists wanted to see reformed. Despite their preferences, however, and in the face of dissent and competition from other contenders, Salinas was clear in his support for Gordillo and she owed the president a significant debt for backing her bid for leadership.

Gordillo's task was clear—she had to bring more order and coherence to the union by incorporating the dissidents and weakening the remnants of Jonguitud's machine.[49] She was largely successful in achieving these objectives. At the union congress in early 1990, Gordillo was again affirmed as the secretary general of SNTE. In the following two years, she consolidated her position by appointing her followers to important positions, engineering elections of the 56 locals of the union, altering the makeup of the national executive committee to include dissident teachers, and extending the tenure of its leadership by two years.[50] These changes made the national committee more representative of SNTE's membership, but also less agile in reaching agreements that could bind the secretary general. Gradually, her ability to be more flexible than Jonguitud and to respond to some of the demands of the dissidents worked to calm the storms within the union.

There were still impediments to reform, however. Although Gordillo emerged as the undisputed leader of the SNTE and tension between the government and the union lessened, it did not disappear. Moreover, the ministry of education was still primarily a creature of the SNTE, not the government. Manuel Bartlett, the minister of education and a veteran politician, was given the task of wresting control of the organization from the union. Bartlett took advantage of a period during which union leaders were focusing on internal conflicts to regain the right to select his own people to head important positions in the ministry, "doing the dirty work of reclaiming the ministry from the union," as one observer commented.[51] In addition, he appointed teams within the ministry to study the possibilities for altering the education system, consult with numerous experts, write reports, and design new systems.[52]

These activities proceeded without a decision about how to deal with the union.[53] Despite the difficult years leading up to 1992, the SNTE was still formidable, its membership intact, and its capacity to corral votes and mobilize labor actions still largely in place. And,

with congressional elections looming in 1991, the president and his allies were well advised not to insist on a change that would further annoy the union. Its votes were needed. In the event, the 1991 elections provided a considerable boost to the president. The PRI garnered 61.5 percent of the vote and, with 320 seats in congress, regained the two-thirds majority needed to pass important legislation.

To add to this improved environment, the economy had grown by 3.4 percent in 1989 and 4.5 percent in 1990, a very positive experience after the difficult times of the early and mid 1980s; growth continued into 1991.[54] Inflation was reduced to 20 percent in 1989 and capital began to flow back into the country. The president had also instituted a highly popular social fund program, PRONASOL, which was garnering him both popular and political support.[55] In addition, teachers received significant wage increases between 1989 and 1991, and these helped defuse union demands for economic justice.[56]

Thus, the president was at the peak of his power at the mid-point of his administration. In January 1992, Salinas appointed his minister of planning and budgeting, Ernesto Zedillo, to the post of education minister, with the instruction to move the education project forward. Zedillo was well regarded for his decisiveness, closeness to Salinas, and affinity for the modernizing vision that infused the administration.[57] The stage was set for negotiations that could lead to the education reforms announced two and a half years earlier.

Negotiating Change

The Salinas administration opted to negotiate with the union rather than to confront it. Ruefully, a lead government negotiator explained that this path was viewed as a necessity. "If you had asked any of us where we wanted the union, we'd have said, three meters underground. But the reality was that we needed them."[58] Indeed, the decision to negotiate rather than to confront the union recognized the important political role of the SNTE. Moreover, the Salinas presidency, tied as it was to the PRI, could not easily turn its back on the largest union incorporated into the party.

These negotiations began almost immediately. Although the resulting agreement was a tripartite consensus document, from the beginning, the negotiations centered on the national government and the SNTE. Most governors, given their preferences, would have actively resisted taking on responsibility for education for fiscal and political reasons. They feared increased political and administrative burdens with the transfer of responsibility for large numbers of new teachers, schools, and students. They also anticipated great risk in central government revenue sharing formulas that could be altered at the whim of the president or the ministry of finance. But they were in a weak position. All but one of them from the PRI, there was little they could do to stop a determined president who had already deposed several governors in bids to emphasize his power. Indeed, according to one official in the ministry, "The agreement was signed [by the governors] because Salinas said 'Sign!' Many of the governors did not want to touch it."[59]

At the outset of the negotiations, SNTE was already on record as being firmly against decentralization. The central issue for the union, of course, was that of annual negotiations

over teacher pay and employment conditions. The governors' authority over such decisions would hit at the heart of the national power of the union, replacing its central role with annual negotiations focused at the state level and on the governors and state-level ministries of education. But the government's decision to refer to the "federalization" of education was something that could be discussed without loss of face and that would enable the union to agree to negotiate. Indeed, Gordillo had already begun to speak of the importance of "modernizing" the educational system, providing another platform on which both the union and the government could agree.[60] Moreover, during the course of the negotiations, the government was careful not to portray the union as an enemy of change; it was, instead, referred to as an important interlocutor for the teachers.[61]

Gordillo strengthened the union's position by establishing the Fundación SNTE para la Cultura del Maestro Mexicano. This think tank was staffed with well-regarded academics, some of whom had held important positions in the ministry of education. Importantly, the foundation gave greater technical credibility to the union's positions by bringing in people who were not identified with the movement in the past. It produced studies and reports that argued for the importance of modernizing education, provided alternatives to the government's proposals, and encouraged greater dialogue about the contents of the reform.[62] According Gordillo, "The proposal of the SNTE was focused on three points: the reoganization of the system, the redesign of educational contents and improved social and political respect for teachers and the teaching role."[63] Moreover, in a "Declaration of Principles," the SNTE announced it was no longer officially connected to the PRI. This move had little immediate practical impact because relations between the union and the party continued much as usual, but it served to increase the autonomy of the union to negotiate directly with the ministry.[64]

A team of ministry negotiators, headed by Undersecretary of Education Esteban Moctezuma, along with Carlos Mancera and others, began meeting daily with groups designated by Gordillo to consider how the education initiative would go forward. For the government, the most important issue was to make decentralization happen and to end the stranglehold of the union and ministry bureaucrats over efforts to improve the system. The minister, given the expectations of the president, was focused on making sure the negotiations proceeded ahead. He was ready to step in and deal personally with the SNTE's leadership when needed. Similarly, he could count on the support of the president. Indeed, according to one of the lead negotiators, "Zedillo had exceptional support and trust [*confianza*] from the president. This was so apparent that he had considerable autonomy to carry out the negotiations without oversight from the office of the presidency."[65] At the same time, the president was clearly and frequently on record in support of the ministry team. This was important for the negotiators. "The ministry had no base of support in the PRI and really didn't have political weight. It was the president who made it happen by signaling his strong commitment very frequently."[66]

Strategically, the government negotiators sought to make clear that the discussions were about a larger package of reforms, not just about decentralization. According to the chief negotiator for the government, "It was important that they realize that if they said no to federalization, they were saying no to a whole package of things, some of which they

wanted."[67] Implicit throughout the discussions, of course, was the promise of an increase in salaries if agreement could be reached. In addition, there was the proposal for a status and salary enhancing *carerra magisterial*, a career ladder that would allow for greater mobility within the teacher corps and increases in salaries with movement on the ladder.[68]

From time to time, as issues arose, the minister and the president met personally with Gordillo to move the agreement forward. Throughout, the union leader maintained a good relationship with Minister Zedillo. More important, however, was her relationship to Salinas. "The relationship of Salinas to Elba Ester was key to the ability to put through the reform….He couldn't have succeeded if someone else had been [leader of the union]. And, of course, behind Elba Ester was the role of Salinas in the conflict with Jonguitud," according to one negotiator.[69] In brief, "He helped her in the leadership struggle in '89 with Jonguitud, and she paid him back three years later by backing the agreement of '92."[70] Thus, along side the formal negotiations, a set of informal meetings helped smooth the way toward agreement. According to Salinas,

> Secretary Zedillo had asked me to intervene directly with the leaders of the SNTE because, within the organization, there was great resistance to the agreement's proposal, in particular, to decentralization. I spoke first with the Secretary-general Gordillo. I trusted in her and in her integrity as a leader. She explained clearly to me all the areas that concerned her: The SNTE leadership believed that decentralization would tear the union apart. The decision to decentralize could mask the federal government withdrawal from its obligations to educate the youth of the country. Teaching salaries at the federal level varied greatly compared to those at the state level, and this would generate tension at the time of decentralization. Many states had no administrative or political capacity to take over the process of decentralization and paying teachers. Finally, she noted, various leaders of union locals believed it was necessary for my administration to postpone the decision to decentralize….for the teachers' leaders themselves to explain to me those and other issues so that we could debate these matters openly.[71]

A subsequent meeting of SNTE union locals with the president, the minister of education, and the mayor of Mexico City resulted in a presidential promise to increase spending on education in the remaining years of his term of office.[72] Eventually, four months of difficult negotiation resulted in an agreement that allowed the SNTE to continue the practice of annual discussions between the ministry of education over increments for the base salaries of teachers and the package of benefits that all teachers were entitled to. State governors would have the opportunity to increase salaries and provide improvements in work conditions, and the teachers would be ensured of a national minimum set of rewards and conditions. As part of this settlement, the teachers were granted a large salary adjustment that boosted their average income to second highest for public sector employees.[73] A sticking point in the negotiations over the *carerra magisterial* was a government-proposed proficiency examination for teachers. The union was adamantly opposed to such a test, but eventually agreed to it when a formula was worked out that assessed proficiency along with seniority.[74] In addition, the agreement reaffirmed the SNTE as the rightful representative of

the teachers in labor matters, set the bases for curriculum and textbook reform, and promised improved training for teachers.[75]

Although largely sidelined during the negotiations, the governors were able to insist that the government be more specific about the terms of the fiscal transfers that would come their way in the aftermath of decentralization. They were also delighted to have the central government continue to be in charge of negotiating salaries with the union.

Some aspects of the existing system did not change. Technical education, a strong fiefdom within the ministry of education, was successful in resisting the decentralization initiative. In addition, teachers of the federal district, a strong group within the SNTE, refused to be part of the new plan. The national government remained in control of this large bureaucracy as well as curriculum, the national program of free textbooks, and the standards set for student performance. In the months that followed the agreement, education remained a vital topic of public discussion. An initiative to introduce new content into the curriculum through newly designed textbooks created a major confrontation between the ministry and critics who decried its treatment of important historical events. The minister of education came close to losing his position over this conflict.[76]

More generally, however, the negotiations and the resulting package of reforms were clearly a milestone in the relations between the government and the union. In the years following the agreement and its ratification through a constitutional reform in 1992 and the 1993 Law for the Modernization of Education, the SNTE continued to focus its attention on basic salaries and work conditions for teachers. From time to time, the teachers' went on strike, and annually, protests and marches interrupted traffic around the ministry of education building in central Mexico City. Indeed, these actions became normal aspects of politics in the country, annoying for ministry officials and drivers, but not threatening to the political system. Even after 2000, when control of the presidency passed from the PRI for the first time in 71 years, the basic relationship between the SNTE and the ministry did not change much. The union continued its demands for salaries and the ministry continued to maintain a relatively close working relationship with the union. More broadly, the union continued to guarantee a large measure of labor peace for the government even while it found that some decisions now focused the attention of its locals on state level negotiations.

Decentralization in Practice

In the years after the 1992 agreement was signed, some claimed that Mexico continued to have one of the most centralized education systems in the world.[77] There was considerable truth in this charge. Central administrators maintained their role in financing, curriculum design, textbook design and selection, regulation of teaching credentials, base salary and benefits negotiations, testing, standards setting, and compensatory programs.

But this distribution of responsibilities did not mean that the decentralization of 1992 was ineffective in altering the preexisting system. After decentralization, the federal government was responsible for 15 percent or less of teachers, students, and schools (see Table 3). The practical implications of these numbers were considerable; state governments

were now expected to make decisions and solve problems that used to be transferred to bureaucrats and politicians in the national capital.[78] Importantly, central bureaucrats lost many of their functions to the new state level administrations. Indeed, much changed in terms of the relationship of the states to the center, of the teachers' union to the states, and of the governors to their education system.

Table 3

Ministry of education expenditures on basic education increased with decentralization (see Figure 2). Indeed, between 1992 and 1994, the ministry raised its expenditures by 32 percent and per pupil expenditures expanded by 27 percent.[79] There was also a marked improvement over most of the 1980s in overall education spending as a percentage of GNP (see Figure 3). As Table 4 demonstrates, the national government initially increased its contribution to total spending, and, by the end of the decade, the balance between national and state sources of funding was virtually the same as before the reform (see also Figure 3). Thus, the 1992 agreement cannot easily be portrayed as an effort of the center to decrease its role in education funding. Equally, anticipating that states would step forward and increase their investment in education was not warranted, at least in the aggregate. Moreover, because the education reform was introduced with a significant increase in teacher salaries and because the new teachers' career included monetary incentives for improved training and performance, most of the increased funding reflected increases in real wages.[80]

Figure 2

Figure 3

Table 4

These conclusions, of course, hide the extent of variation by state. In both the pre- and post-decentralization period, states differed considerably in their expenditures. In large part, this reflected differences in the size of their state education systems. In the post decentralization period, some states increased the extent to which they funded the expanded education systems now under their control. Table 5 indicates that some states, notably those in the northern, more prosperous and industrialized part of the country, significantly increased their proportional contributions to education.

Table 5

Prior to decentralization, all but six states had systems of education that existed side by side with the national system and that were represented by a state level office of the national ministry. These state systems were usually remnants left behind in the process of centralizing education that occurred between the 1920s and the late 1950s (see Table 6).[81] Whatever the size of the preexisting system, decentralization meant that most states would have to find ways of incorporating two separate teachers' corps, two separate administrative systems, and two sets of educational infrastructure when decentralization took effect.[82] Budgets for education automatically doubled, tripled, quadrupled, or more. It is no wonder

that many states were ill prepared to take on these new responsibilities and that considerable chaos characterized the transfer of funds, personnel, students, and infrastructure.[83]

Table 6

Given the weight of education expenditures in state budgets, newly empowered education ministers or managers of independent educational agencies became important players in state level politics. Now responsible for the education payroll and the administration of schools, they, and the governors they served, had significant new resources. Moreover, the leaders of SNTE locals increased in importance as they focused new energies on gaining advances for teachers at the state level.[84] In some states, officials and union leaders managed to routinize a bargaining relationship; in others, they were at loggerheads; in still others, the locals of the union demanded and received positions within the new ministry leadership structures.[85] A review of several states suggests a wide range of experiences with new responsibilities and political interests.

In Guanajuato, a new institute for education was created for the transfer of funds, personnel, and infrastructure. At the same time, the state level ministry of education, which had managed about 27 percent of basic education in the state, remained in control of this system. Eighteen months of intense conflict ensued between the two organizations to control education in the state.[86] Eventually, a group of reformers within the ministry gained power over education policy and managed to limit the capacity of the SNTE to shape its content. This made it possible to introduce a number of changes in the structure and functions of the education bureaucracy, such as unifying the two bureaucratic structures and introducing innovations at lower levels in the system. At the same time, the reformers, by failing to incorporate important interests in their plans for improving education, were unable to sustain the initiative. Indeed, as one study concluded, "a school reform was designed without the school," including participation of the teachers, the school directors, the parents, or local officials.[87]

In Nuevo Leon, a new ministry of education was established and a new minister put in charge of a unified national and state system. Within a short period of time, two groups emerged within this organization. One, known for its commitment to innovation and reform confronted another, made up of older and politically oriented officials with links to the teachers' union, who sought to slow the process of change.[88] The reformers were able to push forward with their agenda, however, and "there was hardly an area of the administrative apparatus of the education sector that was not subjected—with different degrees of intensity—to important structural changes carried out with great innovativeness and in the context of real and radical restructuring of the state."[89] Nevertheless, by the end of the decade, the fusion of the two systems was very incomplete: many teachers in both systems felt orphaned by the state's handling of reform; the problems of implementation were taken as evidence of the failure of decentralization as a reform objective; conflicts continued to characterize the management of education; constraints on the use of funds limited the reach of state level reform initiatives; and local participation in the reform initiative was lacking.[90]

In the state of Chihuahua, the national education agreement coincided with the election of a new governor, representing the Partido de Acción Nacional (PAN) and displacing the PRI from power. The state legislature was also dominated by the PAN. Almost immediately, the SNTE locals mobilized to maintain their control over the education system, where they had been in the habit of naming official education leaders. When the new government announced its commitment to administrative efficiency, improved quality, social participation, and value-oriented education, there was bound to be conflict. Between 1992 and 1995, the state was the site of serious conflicts between the PAN government and the SNTE over virtually all aspects of education and conflicts within the SNTE about the integration of state and federal teachers. In addition, the values-oriented addition to the mandated curriculum engendered tension between the governor and his PAN supporters and the PRI-dominated ministry. The SNTE locals were united in their suspicion that the PAN was intent on privatizing the public education system.[91] Teachers were confused and uncertain about the scope of reform and their relationship to the ministry.[92] This difficult situation began to improve after 1995, when the PAN lost its majority in the state legislature and the PAN governor began to assume a more accommodating position vis-à-vis the PRI.

The state of Oaxaca was characterized by accommodation between the union and the government. Prior to 1992, Oaxaca had virtually no state education system and was therefore able to take on the new responsibilities with little organizational conflict, but with a great deal of uncertainty, given the paucity of experience with managing an education system at the state level. At the time of the national agreement, the state governor was intent on avoiding conflicts with the union.[93] During the 1980s, the union had been active in resisting the leadership of the national ministry of education and had grown distrustful of the national system that was to be transferred to the state. At the same time, the SNTE was a powerful organization at the state level and important within the PRI. The governor met frequently with union leaders, provided a meeting place for retired teachers, increased retirement funds for some teachers, and promised to find land for a warehouse for teaching materials and for the normal school. In late 1992, a new PRI governor took over the leadership of the state and began building new schools and improving old ones, expanding the teacher corps, and building housing for teachers.[94] At the end of the decade, many of the changes in the state were quantitative expressions of expansion of the old system rather than qualitative changes required for a new and more effective system of education.

In contrast to many other states, Aguascalientes became well known as a case in which new management was brought into the education system, resources were managed relatively efficiently, and innovation and creativity characterized officials in the decentralized institute in charge of education.[95] Teacher training, regional content in the curriculum, more and better classroom materials, local school councils, and further decentralization to the municipal level characterized post-decentralization activities in this state.[96] Initially, the local SNTE took to the streets to demand higher salaries and to protest against the lengthening of the school year, a new team-based structure of work, performance-based incentives, and openness about teacher assignments and promotions.[97] But the governor reached an agreement with the union on what was to be altered and what was not, and then was able to choose, independently of the SNTE, the head of the institute for basic and normal education. In the following months, a newly elected governor made education

reform a priority for the state's development and moved ahead with a series of innovative reforms.[98] Early tensions and protests by the SNTE local gradually gave way to a more accommodating stance as union leaders were invited to be part of the reform initiative.[99]

Much of the variation among these states can be credited to the priorities of the governors, their perspectives about the importance of education, and their political party ties. Certainly governors from the PAN were interested in introducing new curricula related to values, as in Chihuahua, and they were at times supported by conservative business groups and the Catholic Church. In addition, however, the degree to which locals of the SNTE were powerful at the state level was important, as was the ability of governors to manage this difficult relationship. In cases in which the union was strong, it acted as a brake on opportunities for reform or governors simply did not believe they could take on the union and win.[100]

A recurring theme in studies of the implementation of decentralization is the failure of the reform to encourage more active community and parental engagement. The Mexican initiative included social participation councils that were to be established at the school level along with new municipal councils to bring together parents, local officials, teachers, administrators, and representatives of business and religious organizations to discuss issues of importance to the local education system. In fact, however, by the end of the decade, these councils had not resulted in effective involvement of parents and other citizens in the schools. The school councils, indicated one observer, "never had a chance in the face of the union and the power of the school professionals."[101] One official argued that "Traditionally, teachers have been very jealous of their rights in the classroom….The constitution says the role of parents is to see that their children get to school—that's all!"[102] According to others, "The teacher decides what happens in the school," and does not invite others to share in such decisions.[103] "If parents complain or put pressure on the school or the teacher, the teacher will retaliate against the child in the class. The parents know this and are very reluctant to speak out."[104]

And, in fact, there was little that parents could do locally to influence the performance of local schools. Although state governments were now administering basic and normal education, and municipalities were given responsibility for the construction of schools at the end of the decade, Mexico's education system remained highly centralized. Curriculum, base salaries and benefits for teachers, most of the funding, standards and criteria for educational achievement—all continued to be determined centrally. The teachers looked to national decision makers to tell them what to teach—and how to teach it—and they did not have much leeway for responding to parental demands, even if they were prepared to do so.

Local input was further limited by ambiguities in the decentralization initiative. As one observer noted, "If you go to the governor or the secretariat of education in the state and complain, they will say 'No, no, we don't have anything to do with that; you have to go to the federal government.' If you go to the federal government to complain, they will say 'No, no, that's the responsibility of the state.'"[105] Under the Fox administration, governors of two states, Tlaxcala and Oaxaca, declared that they were returning their education responsibilities to the central government because they did not have sufficient resources to operate the

system.[106] Given the difficulty of assigning responsibilities, concerned citizens found it difficult to hold officials directly accountable for educational performance. Indeed, the legacies of a centralized and authoritarian system continued to haunt this initiative to improve the quality of Mexico's public schools.

Conclusions

Education reform is replete with empirical evidence of strong losers and weak winners, and of institutions that privilege the status quo and constrain reformers. But the relative weight of winners and losers and the biases of institutions do not fully exhaust the political possibilities for change. The case of Mexico indicates that reform leaders are at times able to create or take advantage of particular moments in the process of policy change to alter the conflict equations that surround such initiatives.

Mexico's 1992 Agreement for the Modernization of Basic and Normal Education was the culmination of a long-term effort to decentralize education to the state level in Mexico. The story of the reform initiative is largely the story of the interaction of the government (represented by the president, the minister of education, and ministry negotiators) and the leadership of the SNTE between 1989 and 1992. There was little involvement of interest groups other than the union, parents were not publicly pressing for reform, and even the state governors were peripheral to the agreement that was forged. [107]

Certainly much of the story about how the reform came about can be credited to the importance of reform leadership. President Salinas conformed to the profile of the reform entrepreneur or champion who has been lauded in other studies of reform. It was clearly through his initiative that an effort to improve the education system was put on the political agenda in 1989. More important, however, were the strategic choices he made in attempting to alter the composition of opposition and changing institutional balances of power in favor of change.

The leadership of the SNTE was critically important to allowing the reform to remain on the agenda from 1989 until 1992 and for making negotiations possible at that point. The president, presented with an opportunity to alter obstructionist leadership by internal union discord and extensive public protests, removed Jonguitud Barrios and replaced him with Gordillo. As a consequence, not only was there new leadership for the union, it was also one that was beholden to the president. In addition, the teachers were recognized through salary adjustments and peace returned to the sector in late 1989 and 1990. Through these actions, the nature of the interests opposed to change were fundamentally altered.

Similarly, reformers were able to take advantage of the need for the new union leadership to attend to internal business and consolidate its power. While this was occurring, the minister of education had an opportune moment to alter the leadership ranks of the ministry by bringing in people who were committed to policy reform rather than to the SNTE. Later, Salinas emphasized the importance of the reform by replacing this minister with one who was strongly associated with his own vision of modernization and known to be

part of the inner circle in Salinas' cabinet. In this way, one of the key institutional constraints to change was altered.

Another important institutional constraint was the weakness of the presidency. The agreement that was possible in 1992 would probably have failed unless the president had been able to take advantage of the authoritarian control over the system that traditionally characterized the Mexican presidency. Moving against some of the most powerful dinasoars in the unions and removing state governors at will, he also improved his popularity with the PRONASOL program. The consolidation of his power was evident in 1991 elections and, at the same time, improvements in the economy increased his power.

These actions suggest that the reformers controlled the timing of the reform and determined the principal actors who would be engaged in negotiating about it. Moreover, they determined the terms of the debate, replacing talk of decentralization with discussions of "federalization" and modernization, dealing with the SNTE as an "interlocutor" for the teachers, and providing salary inducements for the union to go along with the change. That reform was on the agenda, that it got discussed, and that it got agreed upon was certainly largely a result of a series of leadership choices.

But the Mexican case also indicates that reform leadership operates within constrained arenas. The SNTE could certainly not be ignored in pursuing reform, and although the option of confronting the union rather than negotiating with it existed, prior experience had suggested that this would be a losing strategy. Labor peace in the large and politically mobilized education sector was an important condition that only the union could deliver. Ultimately, the reformers depended on the political resources that the union controlled. This dependence limited the scope of the reform. And indeed, by the end of the decade, it was possible to question whether the SNTE had even been weakened through decentralization.

In Mexico, then, reformers settled for less than they wanted in the interests of ensuring labor peace. Moreover, the government remained dependent on the PRI for garnering support and was constrained in terms of how much it could antagonize the teachers. All options were not on the table when Salinas committed himself to altering the existing education system. In addition, as it was implemented, the impact of the policy was altered by new conflicts at the state level and the variable ability of reform proponents to manage that conflict. Thus, education reform brought distinct consequences at more local levels of government.

It is significant that the reform in Mexico was initiated, planned, negotiated, and carried out among a very small group of government and SNTE officials. Although some citizens became involved in the 1989 CNTE protests, this case is notable for the absence of public demands or support for educational change. While the education reform emerged at a time of increasing pressures for democratization in Mexico and increasing skepticism of the PRI regime, education did not figure among the demands being made by mobilized interests or citizen groups more generally. CNTE's demands for union democracy were important, of course, but the long-cemented corporatist relationship between the SNTE, the PRI, and the

government meant little opportunity for broader participation in policy making. Moreover, the CNTE was not demanding better education, it was demanding a better deal for teachers and a more responsive union. Change was engineered through elite negotiations and consensus building rather than by democratic participation.

Indeed, there was no non-government counterweight to the teachers' union. Presidential power and leadership choices were a centrally important factor in explaining the ability to restructure the education system, but much more might have been achieved had there been effectively mobilized support for change outside the government. At the time, there were very few spaces in which parents and communities could become active in encouraging and monitoring what occurred once decentralization had become reality.

In comparative perspective, the 1992 agreement was modest compared to what other countries in Latin America were putting in place at about the same time. Some countries, such as Chile and Colombia, were undertaking decentralization to the municipal level. Others, such as Nicaragua and some states in Brazil, were placing the main responsibility for the management of education at the school level in radical efforts to increase accountability and performance. The designers of Mexico's reform were adamant that the quality of education in the country would not improve until the system was decentralized and the hold of the union over education policy was weakened. At the end of the decade, however, there was little evidence that the quality of education in the country has improved in general. According to one government official, "The reform is an unfinished one. It is caught in a culture of centralization and the 'pacted hegemony' of the SNTE."[108] Another informant called the 1992 reform "a great missed opportunity."[109] Indeed, the 1992 agreement epitomized the limitations that national politics under the PRI regime imposed on all public policies—negotiation with powerful interests and imposition of results on reluctant or unengaged publics.

Table 1
The Politics of Access and Quality Reforms: A Comparison

	Access Reforms	Quality-Enhancing Reforms
Typical actions to carry out such reforms	• Build infrastructure • Expand bureaucracies • Increase budgets • Hire administrators • Hire service providers • Buy equipment	• Improve management • Increase efficiency • Alter rules/behavior of personnel • Improve accountability • Improve performance • Strengthen local control
Typical political implications of such reforms	Creation of benefits: • Jobs • Construction and provisioning contracts • Increased budgets • Increased power for ministries and managers	Imposition of costs: • Loss of jobs • Loss of decision making power for some • New demands, expectations, responsibilities for others
Typical political response to such reforms	• Unions of providers welcome reforms and collaborate with them • Politicians welcome tangible benefits to distribute to constituencies • Communities are pleased to receive benefits • Voters support changes	• Unions of providers resist reforms • Administrators seek to ignore or sabotage change • Many politicians wish to avoid promoting reforms • Many voters are unaware of changes (at least in the short term)

Table 2
Inequality in Schooling in Puebla, Mexico: Infrastructure and Teacher Qualifications by Urban, Rural, and Indigenous Zones (Percentage of Schools)

Zone	Urban Middle Class	Urban Marginal	Rural Developed	Rural Marginal	Indigenous
Drinking Water	81.3	50.0	60.0	7.1	37.5
Electricity	87.5	87.5	86.7	57.1	37.5
Bathrooms or latrines	87.5	87.5	93.3	78.6	31.3
Sports court	75.0	37.5	40.0	42.9	50.0
Office	37.5	43.8	46.7	14.3	12.5
Patio	87.5	75.0	86.7	71.4	25.0
Auditorium	37.5	12.5	26.7	0.0	12.5
Teacher's house	43.8	37.5	26.7	78.6	31.3
Teachers' Schooling					
9 years or less	1.1	0.0	0.0	0.0	20.9
10-11 years	4.3	3.3	1.4	0.0	9.3
12-13 years	33.9	35.9	45.1	64.0	58.1
14-15 years	6.3	22.9	18.3	12.0	9.3
16 years or more	54.0	38.0	35.2	24.0	2.3

Source: Schmelkes (2000: 328-329)

Table 3
Enrollment, Teachers, and Schools in Mexico by Source of Funding

	Basic Education*	
	1991-92 pre-reform %	1996-97 post-reform %
Enrollment		
National	71	8
State	22	86
Private	7	7
Teachers		
National	70	10
State	22	81
Private	8	9
Schools		
National	75	15
State	19	78
Private	7	7

* preschool, primary, secondary schools
Source: Merino (1999:41)

Table 4
Distribution of Public Education Expenditures Before and After Decentralization and Changes in Per Pupil Expenditures

	Percentage of Total Public Expenditure		Average Per Pupil Expenditure Federal Ministry of Education only (2000 Pesos)
	Federal Sources	State Sources	
1992 (Pre-decentralization)	85.6	14.4	5901
1994	88.8	11.2	7470
1996	83.2	16.8	6519
1998	84.6	15.4	7824
2000	85.2	14.8	8354

Source: SEP 2000: 173, 175

Table 5
Mexico State Educational Expenditures as a Percentage of Total State Expenditures

State	1992	1996
Aguascalientes	3.8	8.3
Baja California	42.3	57.2
Baja California Sur	9.4	2.7
Campeche	15.8	17.2
Chiapas	30.0	26.0
Chihuahua	24.1	39.1
Coahuila	44.3	45.4
Colima	19.2	5.5
Durango	30.7	51.5
Guanajuato	28.5	21.5
Guerrero	10.2	9.8
Hidalgo	3.1	11.1
Jalisco	66.3	45.6
México	27.8	35.2
Michoacán	14.4	22.8
Morelos	5.3	2.7
Nayarit	22.0	38.3
Nuevo León	32.2	52.8
Oaxaca	3.3	2.5
Puebla	21.4	25.5
Querétaro	9.5	16.3
Quintana Roo	7.3	7.5
San Luis Potosí	9.8	22.0
Sinaloa	26.7	45.6
Sonora	24.8	41.9
Tabasco	16.6	20.8
Tamaulipas	23.1	30.7
Tlaxcala	19.6	11.4
Veracruz	33.7	22.0
Yucatán	19.2	38.1
Zacatecas	33.2	27.0

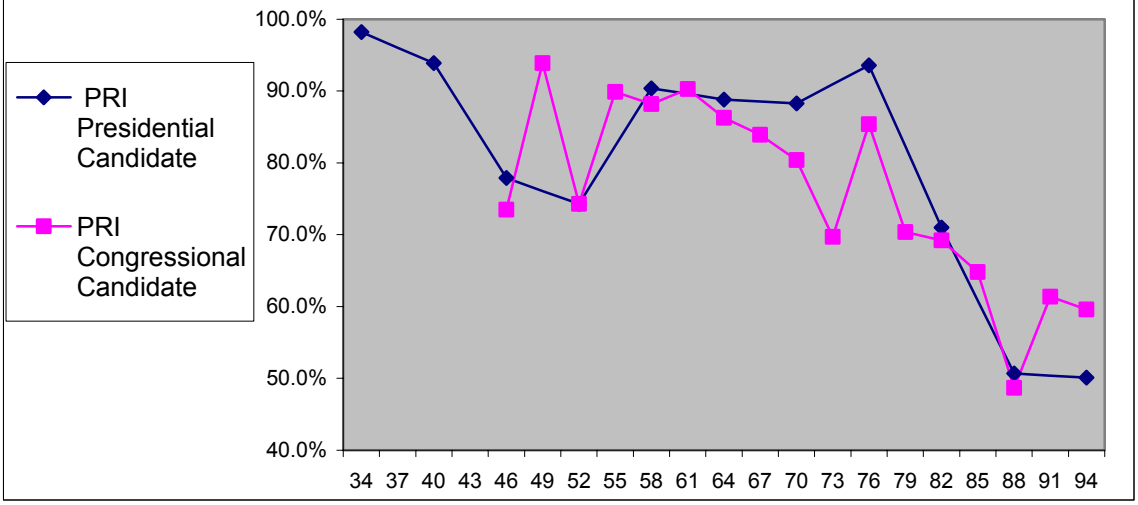
Source: Merino (1999:95).

Table 6
Percentage of Basic Education Students Enrolled in State Schools
1991-1992 School Year

México (state)	50.3	Yucatan	26.7	Quintana Roo	4.5
Nuevo León	40.9	Zapatecas	24.8	Campeche	3.0
Baja California	39.0	Chiapas	23.7	Aguascalientes	2.9
Jalisco	36.2	Tlaxcala	23.3	B. California Sur	2.7
Veracruz	31.3	Coahuila	20.1	Morelos	1.1
Sinaloa	30.6	Guerrero	18.2	Querétaro	0.5
Sonora	30.0	Nayarit	16.7	Tamaulipas	0.4
Chihuahua	29.4	San Luis Potosí	16.6	Oaxaca	0.1
Durango	28.5	Tabasco	15.4	Hidalgo	0.0
Guanajuato	27.3	Colima	9.1	Distrito Federal	0.1
Puebla	27.1	Michoacán	5.4	National	23.1

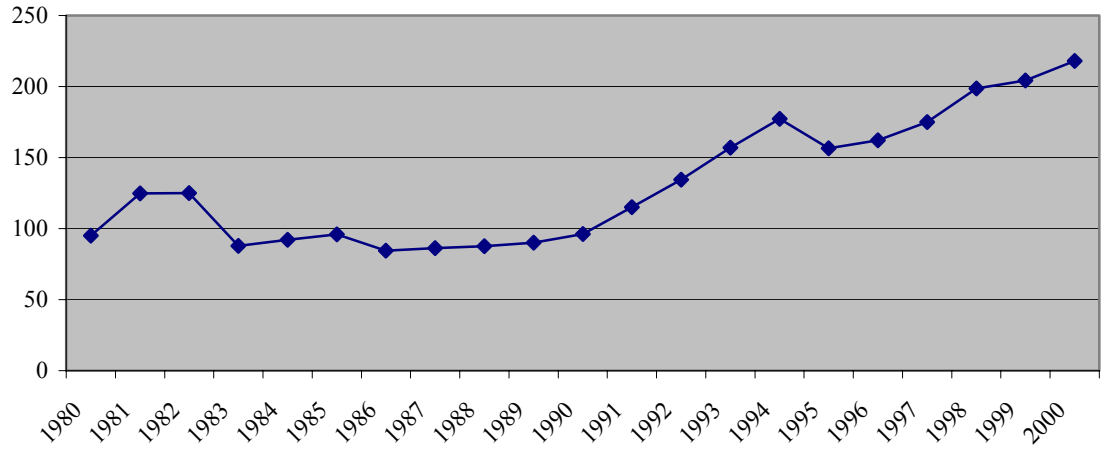
Source: Merino (1999:51)

Figure 1
Electoral Support for the PRI
1930s-1990s (Percent of Total Vote)



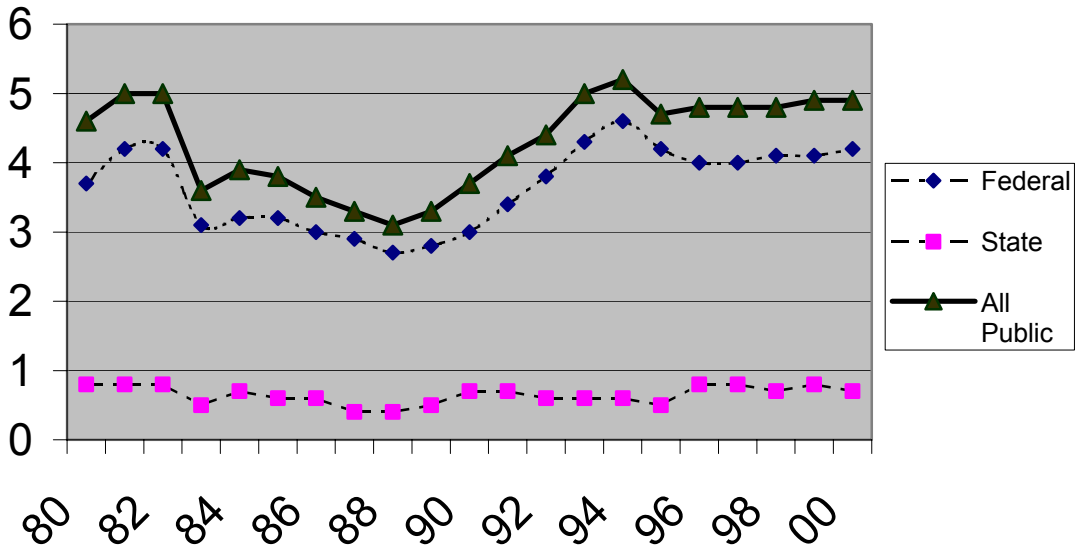
Source: Cornelius and Craig (1991:66); Base de Datos Políticos de las Américas (1999), Elecciones Presidenciales, Mexico. [internet] Georgetown University y Organización de Estados Americanos: http//www.Georgetown.edu/pdba/Elecdata/Mexico. February 20, 2002.

Figure 2
Ministry of Education Expenditures 1980-2000
(billions of 2000 pesos)



Source: SEP (2000:173)

Figure 3
Education Expenditure as a Percentage of GDP



Source: SEP (2000:173).

Notes

[1]Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, El Salvador, Mexico, Nicaragua, and Uruguay made substantial progress in promoting education reform by 2000. Venezuela and Guatemala were less successful reformers, but did manage to make some progress in implementing significant changes. Peru, Ecuador, Honduras, and Paraguay made little progress in adopting or implementing change-oriented policies in the decade. See Grindle (forthcoming).

[2]On the content of the reform, see Cominetti and Gropello (1998); Gershberg (1999) and Tatto (1999). In Mexico, basic education comprises preschool, primary, and secondary schooling.

[3]Murillo (1999:39).

[4]See, for examples, Harberger (1984) and Srinivasan (1985).

[5]See, for examples, González-Rosetti and Bossert (2000); Kingstone (1999).

[6]See, for example, Wallis (1999).

[7]Indeed, when reformers at times failed in efforts to introduce significant quality-enhancing reforms, they generally reverted to more popular access-type reforms like building more schools and improving infrastructure.

[8]UNESCO (2000:30).

[9]UNDP (2001):175.

[10]That is, the average number of years of formal schooling. UNESCO (2000:137, 141). While Mexico regularly reports very high net enrollment rates at the primary level, many studies point to evidence that a significant number of children, particularly in poor rural and indigenous zones, do not attend school. See, for example, Schmelkes (2000).

[11]By 1996, the secondary net enrollment rate was 51 percent. UNESCO (2000:149).

[12]UNESCO (2000:145).

[13]Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación (1998:50-51).

[14]Reimers (2000:91).

[15]IDB household survey data, cited in Reimers (2000: 66).

[16]CEPAL data, cited in Reimers (2000:73).

[17]Muñiz 2000 (in Reimers 2000); Schmelkes 2000 (in Reimers 2000).

[18]Arnaut (1998b:Chapter 4).

[19]Merino, 1999:41. See also Murillo (1999:38).

[20]Larmer (1989:4).

[21]See Ornelas (1988:108-109).

[22]On this system, see Duarte (1999: 17); Martin (1993:153); and Murillo (1999:37-41). In the late 1980s, dissident teachers alleged that the going rate for a teaching position was as much as $600-$650. Teachers at the time were earning $150 a month (Larmer, 1989:4; Rohter, 1989:12).

[23]See Arnaut (1998a:12); and Arnaut (1998b)

[24]Arnaut (1998b:148).

[25]Arnaut (1998b:245-255).

[26]Arnaut (1998b:255-263).

[27]Fiske (1996:17-18).

[28]Arnaut (1998b:271-275).

[29]By this time, the national ministry had become very large and complex. In 1982, it was "composed of 7 undersecretariats, 44 director-generalships, 304 managerships, 6 councils, an international general administration and budgeting committee, a controller's office, a general co-ordinator, 31 state delegations and nearly 60 co-ordinated institutions" (Ornelas, 1988:107). To this could be added 800,000 employees and millions of students. It distributed some 100 million textbooks and managed school siting and building around the country.

[30]See Cook (1996:73-77).

[31]Cook (1996:268n.2).

[32]Interview, July 2, 2001, Mexico City.

[33] Personal communication, March 8, 2002. Moreover, "The most reliable research also showed an enormously important fact: Women who finished primary school had fewer

children (half as many) as those who did not finish. In a country with over 90 million inhabitants, one of the most effective and fairest means to slow demographic dynamics was by guaranteeing quality education for women" (Salinas de Gortari, 2002:609).

[34] Salinas de Gortari (2002:10).

[35] Personal communication, March 8, 2002.

[36]The narrow and widely questioned victory even called into question the SNTE's ability to deliver the teachers' votes. It was likely that many voted for the PRD (Cook,1996:267).

[37]See Grindle (1996:81-82).

[38]Data in this paragraph taken from World Bank, *World Tables*

[39]Grindle (1996:81).

[40]Salinas had been minister of planning and budgeting in the previous administration and was widely thought to be responsible for austerity measures that cut deeply into public sector salaries.

[41]See Grindle (1996:93).

[42]See Alvarez Béjar (1991:48-51); Cook (1996); and de la Garza (1991:179-181)

[43]Murillo (1999:41); and Cook (1996:269-270).
[44] *Crónica del Gobierno de Carlos Salinas de Gortari, Primer Año*, (Mexico City: Fondo de Cultura Económica, 1994:132), quoted in Salinas de Gortari (2002:606).

[45]Murillo (1999:41); Rohter (1989:12); and Larmer (1989:4).

[46]Cook (1996:269-270).

[47] Salinas de Gortari (2002:607).

[48]Cook (1996:269-270). The election was convened by the interior minister.

[49]Cook (1996:271).

[50]For example, she enlarged the central executive committee, increasing the number of interests represented and making it more difficult for the committee to reach consensus, thus increasing her own autonomy.

[51]Interview, June 26, 2001, Mexico City. Bartlett had been one of the contenders for the PRI nomination in 1988.

[52]Pescador Osuna (1992:4-5).

[53]Bartlett wanted to confront and defeat the union, taking advantage of its moment of weakened leadership and internal dissent. This was not considered a viable option by Salinas.

[54]Data in this paragraph are taken from World Bank, *World Tables.*

[55]See Cornelius, Craig, and Fox (1994); Moreno (1996).

[56]In December 1988, salaries were raised 10 percent, between May and July of 1989, a further 25 percent, in December, 10 percent, and between May and July of 1990, another 24 percent. In December 1990, another raise of 14 percent was granted, followed by a May-July 1991 increase of 16 percent, and a December increase of 13 percent. Although these increases just barely kept ahead of inflation, the teachers became relatively better off than most government workers. Cook (1996:280-281).

[57]Loyo (1992:22).

[58]Interview, July 4, 2001.

[59]Interview, July 4, 2001, Mexico City.

[60]Loyo (1992:20).

[61]Interview, June 26, 2001, Lomas de Santa Fe, Mexico.

[62]Gordillo (1992:13).

[63]Gordillo (1992:13), translation by the author.

[64]Cook (1996:279-280).

[65]Interview, June 26, 2001, Mexico City.

[66]Interview, June 26, 2001, Lomas de Santa Fe, Mexico.

[67]Interview, July 4, 2001, Mexico City.

[68]Tatto (1999:278). Teachers could move on this ladder without having to leave teaching and move into an administrative role. The reform simultaneously offered an opportunity to good teachers to remain in teaching roles and also added many new positions at higher salaries without creating more administrators. By 1999, 193,000 teachers were incorporated into the new system (SEP, 2000:156).

[69]Interview, June 27, 2001, Lomas Anáhuac, Mexico.

[70]Interview, June 27, 2001, Mexico City.

[71] Salinas de Gortari (2002:215-16).

[72] Salinas de Gortari (2002:217).

[73]Murillo (1999:44).

[74]The union, convinced that the ministry was imposing this new set of standards for training, promotion, and remuneration, was initially very suspicious of the *carerra magisterial.* Its leaders believed that this new system strengthened the ministry's position over the advancement of teachers and was part of governmental efforts to reduce costs and weaken the union. See Tatto (1999:272-274); and Street (1998:11).

[75] For a discussion of the contents of the National Agreement for the Modernization of Basic Education, see Pescador Osuna (1992).

[76] Salinas de Gortari (2002:620).

[77]Cabrero Mendoza, Flamand Gómez, Santizo Rodall, and Vega Godínez (1997:330). Indeed, the system is often compared to the highly centralized French system.

[78]Ornelas (n.d.:12).

[79]SEP (2000:175).

[80]Merino (1999:86). In 1995, 97.9 percent of total current federal education expenditures were destined for teacher salaries (UNESCO 1998:161).

[81]Merino (1999:51). Even in the state systems, however, the national government determined curricula, the school calendar, and the contents of textbooks.

[82]In addition to the six states that had no state level system, five more states opted for a direct transfer to a state level ministry of education. Eleven additional states moved to fuse the two systems through law. And nine states opted to create decentralized institutes to administer the former national school system, keeping them separate from the state systems. Of these nine, five maintained two leadership structures for managing the systems separately. The reasons behind these different choices were diverse. At times, state level teachers were paid more than the national teachers and integrating them would have meant that state budgets would have borne substantial costs in bringing all teachers up to the same level. In some cases, also, the size of the transfer in terms of money, teachers, schools, and students, was so large that state administrations feared being

swamped by the new responsibilities. Governors at times wanted to keep the local units of the SNTE at arm's length and thus opted for keeping the two systems separate. In the cases of fusion and direct transfer, these constraints were less threatening. At the end of the decade, the national ministry was putting pressure on all state level systems to integrate more fully, especially in terms of planning, teacher training, and day-to-day administration.

[83]Cabrero Mendoza, Flamand Gómez, Santizo Rodall, and Vega Godínez (1997:348).

[84]Ornelas (n.d.:13).

[85]Ornelas (n.d.:14).

[86]Fierro Evans and Tapia García (1999:177-180).

[87]Fierro Evans and Tapia García (1999:236).

[88]Mejía Ayala (1999:263).

[89]Mejía Ayala (1999:297), author's translation.

[90]Mejía Ayala (1999:298).

[91]Loera Varela and Sandoval Salinas (1999:438-439).

[92]Possibly as a result of this difficult situation, Chihuahua fell from being number 15 in terms of the number of students finishing primary school before 1992 to number 22 after decentralization. Loera Varela and Sandoval Salinas (1999:455).

[93]Ruiz Cervantes (1999:513).

[94]Ruiz Cervantes (1999:522-528).

[95]Cabrero Mendoza, Flamand Gómez, Santizo Rodall, and Vega Godínez (1997:347).

[96]Cabrero Mendoza, Flamand Gómez, Santizo Rodall, and Vega Godínez (1997:347). According to one study, the average years of schooling increased from 6.8 years in 1990 to 8.4 in 1998, school attendance increased from 83 percent in 1992 to 95 percent in 1997, and the number of children finishing primary school increased from 86 percent of those beginning school in 1987 to 93 percent of those beginning in 1991 (Zorrilla Fierro, 1999:386-387).

[97]SEP (2000a:760).

[98]An education council brought together officials, academics, union leadership, and teachers to discuss plans for reform and gradually, officials within the education institute

became convinced of the importance of change. An education plan created local commissions of teachers and supervisors that became experts in some aspect of schooling and developed innovations around this expertise. The state level institution in charge of education instituted a regionalized administrative system as a way of decentralizing decision-making. English language training and computers were introduced into the classrooms. Zorrilla Fierro (1999:346-347).

[99]SEP (2000a:765).

[100]It is perhaps for this reason that several of the states considered to be more advanced in improving the quality of education were small ones—Aguascalientes, Guanajuato, and Tabasco, for example. Little progress was made in large states where the SNTE was larger and more powerful—the Federal District, Guerrero, Oaxaca, Chiapas, Michoacan, and Veracruz, for example.

[101]Interview, July 2, 2001, Mexico City.

[102]Interview, July 4, 2001, Mexico City.

[103]Interview, July 2, 2001, Mexico City.

[104]Interview, June 26, 2001, Lomas de Santa Fe, Mexico.

[105]Interview, July 2, 2001, Mexico City.

[106]Zuckerman (2001).

[107]Ornelas (n.d.:2-3).

[108]Interview, June 27, 2001, Mexico City.

[109]Interview, June 27, 2001, Mexico City.

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