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September 2023

**“The mixed record of democracy and education in Mexico:  
Paradoxes of electoral competition, education and weak policy  
institutions”**

A thesis submitted to McGill University in partial fulfillment of the requirements of the  
degree of Master of Arts in Political Science Development Studies Option

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## Abstract

*This thesis analyzes the effects of the political dynamics in Mexico on education as a federal social policy item and how they operate in an environment of weak policy institutions. It does so by conducting archival, discourse, and policy analysis through the three distinct party federal administrations in power, operationalized as units of analysis after the Mexican period of transition from autocracy to democracy. In doing so, it unveils the political causes and factors to partially answer why democratization and higher electoral competition in Mexico, often assumed to improve social policies such as education in middle-income countries, has contributed to the stagnation (rather than the improvement) of the public education system in Mexico.*

*The main goal of this thesis is to contribute to the analysis of the effects of electoral competition and the alternation of federal power levels on education policies in Mexico. It challenges common theoretical assumptions derived from large-N research works in comparative developing politics and regime change that tend to correlate, and often overstate, a natural connection between democracy and electoral competition with improvements in education as social policy. A secondary goal is to illustrate how ongoing party rotation at the presidential level, impacts the political dynamics (both formal and informal) of actors involved in Mexican education policy and education governance in a context of weak policy institutions. As the policy institutions were shaped, centralized, and organized in an autocratic state for 72 years, this thesis contributes to the understanding of how constantly reshaped configurations of formal and informal power stakeholders at the elite level affect the way that education policy is framed, negotiated, and implemented in a more competitive electoral and unstable environment.*

## Abstrait

*Ce mémoire analyse les effets de la dynamique politique mexicaine sur l'éducation en tant qu'élément de la politique sociale fédérale et la manière dont elle fonctionne dans un environnement où les institutions politiques sont faibles. Pour ce faire, ce mémoire procède à une analyse des archives, du discours et de la politique à travers les trois administrations fédérales distinctes au pouvoir, considérées comme les unités d'analyse après la période mexicaine de transition de l'autocratie à la démocratie. Ce faisant, il dévoile les causes et les facteurs politiques qui expliquent en partie pourquoi la démocratisation et la concurrence électorale accrue au Mexique, souvent censées améliorer les politiques sociales telles que l'éducation dans les pays à revenu intermédiaire, ont contribué à la stagnation (plutôt qu'à l'amélioration) du système d'éducation publique au Mexique.*

*L'objectif principal de ce mémoire est ainsi de contribuer à l'analyse des effets de la compétition électorale et de l'alternance des niveaux de pouvoir fédéraux sur les politiques d'éducation au Mexique. Il remet en question les hypothèses théoriques communes dérivées de recherches sur les politiques comparées en développement et les changements de régime, qui tendent à établir une corrélation, souvent exagérée, entre la démocratie et la compétition électorale et les améliorations de l'éducation en tant que politique sociale. Un objectif secondaire est d'illustrer comment la rotation permanente des partis au niveau présidentiel a un impact sur la dynamique politique (à la fois formelle et informelle) des acteurs impliqués dans la politique d'éducation mexicaine et la gouvernance de l'éducation dans un contexte de faiblesse des institutions politiques. Comme les institutions politiques ont été façonnées, centralisées et organisées dans un État autocratique pendant 72 ans, ce mémoire contribue à la compréhension de la manière dont les configurations constamment remodelées des acteurs du pouvoir formel et informel au niveau de l'élite affectent la façon dont la politique d'éducation est encadrée, négociée et mise en œuvre dans un environnement électoral plus compétitif et plus instable.*

## List of Abbreviations

AMLO	Andrés Manuel López Obrador
CNTE	Coordinadora Nacional para Trabajadores de la Educación
ENLACE	Evaluación Nacional de Logros Académicos en Centros Escolares
EPN	Enrique Peña Nieto
INE	Instituto Nacional Electoral
INEE	Instituto Nacional para la Evaluación de la Educación
LGE	Ley General de Educación
MORENA	Partido del Movimiento de Regeneración Nacional
OECD	The Organization for Economic Cooperation and Development
PAN	Partido de Acción Nacional
PND	Plan Nacional de Desarrollo
PRD	Partido de Revolución Democrática
PRI	Partido Revolucionario Institucional
PROGRESA	Programa de Educación, Salud y Alimentación
SEP	Secretaría de Educación Pública
SNTE	Sindicato Nacional de Trabajadores de la Educación
UNESCO	United Nations Educational, Scientific and Cultural Organization

## Acknowledgements

*To my parents, who always thought they should have given me more without realizing they already gave me everything. To my sister, my company on countless sleepless nights and constant example to pursue my passions. To my grandpa Roberto, mi viejito chulo, who never really understood what I do and yet never failed to express how proud I made him. To Jorge and my education policy family for taking me in and finish raising me during my early professional years. I cherish every mezcal discussion that motivated me to believe a more just society is possible and Mexican education is not doomed. To my little Montréal tribe: Daniel, Julianne, Alexandria, Bavo, Dilse and Chris, who helped me through every step of the thesis process and were always ready to provide words of encouragement and an extra set of eyes for editing when mine were too tired to carry on. To my supervisor Manuel Balán, for guiding me with kindness and patience as well as directing my scattered ideas into a coherent and interesting research puzzle. To my McGill professors Erik Martínez Kuhonta, Juan Wang and Khalid Medani. They shaped my research endeavors by always sharing their knowledge with such passion, further fostering my curiosity for development politics, and challenging me thorough the entire program. To Tomás, my little companion who I did not get to say goodbye to.*

## Introduction

Mexico, like other middle-income countries in Latin America and the Global South, has undergone an expansion of the public education system often linked with the timing of the third wave of democratization (Haggard and Kaufman 2008; Stasavage 2005; Harding and Stasavage 2014; Brown 1999; Harding 2020; Brown and Hunter 1999; Teichman 2009). The expansion is evidenced by first, a sustained increase in the percentage coverage of basic education (particularly in the primary and secondary levels) over the past decades. Secondly, there has been relatively stable spending on education as a percentage of the GDP over time (Zubieta García et al. 2015, 81–83; OECD 2012; 2006; 2018; 2022; Contreras López, López Garrido, and Jiménez Rico 2022).

However, to this day, low levels of upper secondary and post-secondary non-tertiary attainment prevail in Mexico.<sup>1</sup> Mexican public spending in education, especially at the tertiary level, has mostly experienced a state pull back in the last decades. One reason was the macroeconomic component associated to neoliberal economic reforms pushing for state retreat in public services in the 1980s and 1990s in Mexico and elsewhere. Public higher education institutions were unable to absorb the increasing demand in the 1990s, which led the government to “encourage entrepreneurial activity” from higher education institutions (Hicks 2017, 111). Thus, the number of private institutions multiplied and was coupled with lower governmental supervision of quality, easy access to permits, and an absence of fee regulations for private institutions (Hicks 2017). From a fiscal perspective, this trend is

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<sup>1</sup> Upper secondary, referred to as “Media Superior” in México, is equivalent to the years and the levels of High School in other national Education systems, targeted at population in ages between 16 and 18 years old. Oscillating between 4.5% and 5.2% of the GDP in the last twenty years, according to the World Bank; as per recommended by international organizations such as the UNESCO and OECD but at 0.2 percentage points lower than the OECD average (OECD 2022; World Bank 2022)

consistent with the evidence of tertiary education being funded through regressive spending (Gruber and Kosack 2014; World Bank 2022; B. W. Ansell 2010; Bocking 2020; Torres and Schugurensky 2002); whereas primary and secondary spending is associated with progressive taxation oriented towards equity for access (Rauscher and Shen 2022; F. M. Reimers 2015).

This thesis endeavors to analyze the effects of electoral competition and political party rotation in Mexico on education as a federal policy item. It seeks to unveil why democratization and higher electoral competition in Mexico, often assumed to improve social policies such as education in middle-income countries, seem to have contributed to the stagnation—rather than the improvement—of the public education system in Mexico (Torres and Schugurensky 2002, 439; Kurtz 2002; Weyland 2009; María Victoria Murillo 1999; D. Scott et al. 2018; Bocking 2020; Instituto Nacional para la Evaluación de la Educación (INEE). 2019; Zubieta García et al. 2015).

## **1. Research Objectives and Design**

This thesis employs a within case analysis of the three Mexican federal administrations between 2006 and 2022 following the 72-year one party autocratic rule by the *Partido Revolucionario Institucional* (Institutionalized Revolution Party).<sup>2</sup> Each federal administration is treated as a unit of analysis, as each administration came with different political ideals and programmatic agendas. Therefore, this thesis finds different attributes and characteristics regarding education policy in each period, defined as the collection of bylaws

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<sup>2</sup> Hereafter referred to as PRI.

and programs that operationalized the policy item at the federal level. In practice, all three parties have been operating with relatively constant and common procedures even though they have been unable to enhance the performance and quality of the national education system to reduce inequality and foster social mobility. The Mexican case challenges common theoretical assumptions derived from large-N research within the field of comparative politics and democratic transitions that tend to correlate, and often overstate, the effects of democracy and electoral competition with improvements in education as a social policy (Kaufman and Segura-Ubiergo 2001; Baum and Lake 2003; Brown 1999; Haggard and Kaufman 2008).

A secondary goal is to better understand how ongoing party rotation at the presidential level impacts the political dynamics of education governance. In a formal setting, there are political negotiations and procedures over education policy (e.g. budget, programs, and education reforms) that engage actors involved in education. The most relevant actors at the federal level according to the constitution and general law of education should be the president, the legislative chambers and policy institutions such as the *Secretaría de Educación Pública* (Secretary of Public Education) (Poder Legislativo Federal 1917).<sup>3</sup> However, this formal setting works in parallel with informal governance practices, giving a larger area of influence to political parties and national teacher union leadership. This secondary goal seeks to better understand how constantly re-shaped configurations of formal and informal dynamics between political stakeholders at the elite level affect the way that education policy is framed, negotiated, and implemented. These dynamics between actors are affected by a more

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<sup>3</sup> Hereafter referred to as SEP.



competitive electoral environment and changing alliances. In addition, an environmental factor in education policy is that added to the ongoing rotation of stakeholders' institutional legacies of vertical and centralized rule over education governance remain in place. As a result, policies for the field of education in Mexico tend to fall under the categories of window dressing and aspirational policies, as traits of weak policy institutions (Htun and Jensenius 2020; Brinks, Levitsky, and Murillo 2019) .

At its core, this thesis seeks to answer the following questions: how has democratization and the increasing electoral competition in Mexico at the federal level between 2006 and 2022 affected the politics of education? What changes to education policy are the result of back-to-back alternations in power? In other words, given the changes to the political dynamics derived from power rotation in a highly vertical and centralized system, how has electoral competition at the presidential level altered education policy across politically and programmatically distinct party administrations?

This work addresses these questions by conducting archival research on official governmental documents, discourse analysis of elite federal policymakers, and historic policy analysis across the three distinct party federal administrations that took the presidential office after the Mexican transition period to democracy. It examines the administration of Francisco Calderón Hinojosa, elected president from the right wing and pro-business *Partido de Acción Nacional* (National Action Party) from 2006 to 2012.<sup>4</sup> Then, it moves to analyzing the administration of Enrique Peña Nieto, which marked the return of PRI to power from

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<sup>4</sup> Hereafter referred to as PAN. See Hecock 2006 and Hurtado Razo 2011.

2012 to 2018. Finally, the thesis looks at the administration of Andrés Manuel López Obrador, elected in his third run for presidential office under the *Partido del Movimiento de Regeneración Nacional* (National Regeneration Movement) from 2018 to 2022.<sup>5</sup>

This research argues that increased federal electoral competition following democratization combined with an environment of weak policy institutions has not produced the anticipated improvements in education. Education has manifold potential as a social policy item for the economic and social development, increase party legitimacy, and produce a crowd-pleasing effect for voters (B. W. Ansell 2010; Haggard and Kaufman 2008; Kapiszewski, Levitsky, and Yashar 2021). However, despite the potential benefits electoral competition in Mexico has altered education primarily by shuffling the formal and informal dynamics of stakeholders involved in education governance during each administration, including alliances, pacts, and power distribution in education governance and policy.<sup>6</sup>

The three elected presidents and their federal administrations since 2006 were concerned with asserting their party's legitimacy as a viable and credible electoral option vis a vis other contestant. Yet, an interesting similarity among the presidents and their platforms are that they all used a distinct and unique framing for education consistent with their party narrative and employed keywords matching their vision for the country. Furthermore, despite their distinct framing of policy each party placed education at the center of their discourse for improving economic and social equality outcomes d in their electoral platforms, government

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<sup>5</sup> Hereafter referred to as MORENA.

<sup>6</sup> For clarity, this thesis contemplates elite actors in federal education governance as the president, secretaries and sub secretaries of education, legislators in both chambers of congress (specifically the education committees' leadership), and national teacher unions.

plans and national plans of development.<sup>7</sup> Education policy was framed by all three parties as the foundation of change and to some extent instrumentalized for electoral support as a glorified “window dressing policy” (Htun and Jensenius 2020; Levitsky 2018; Levitsky and Murillo 2013). All three parties promoted education as the medicine for all the social and economic problems the country was facing at the time of their election.

A third similarly shared across administrations is the prevalence of informal arrangements for policy decision-making at the elite level, specifically involving the president, political party leaders, federal education bureaucracy as well as the national leadership of teacher unions. These include the distribution of top positions within the bureaucratic apparatus among teacher unions leaders at the state and federal levels (Navarro Gallegos 2009; Bocking 2020; Hecock 2014); as well as pacts between senior party leaders to fast tract reforms packages at the legislative body such as the “Pacto por México” (Nieto and Tepperman 2014; Mayer-Serra 2017; Arrieta Ceniceros and Ramírez Arriaga 2016).<sup>8</sup> This ongoing prevalence of informal political arrangements evidence that some institutional legacies concerning seventy-two-year rule have not been fully addressed by the democratic transition and administrations in power after it.

Democracy in Mexico as in other developing regions promised to fix major national issues with education at the center. Yet the processes behind education policy have not necessarily turned more democratic, nor have they facilitated deeper access for non-elite civil society

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<sup>7</sup> See Presidencia de la República 2007; 2013; 2019; Partido de Acción Nacional 2006; Partido Revolucionario Institucional 2012; MORENA 2018.

<sup>8</sup> Translates from Spanish to “Pact for Mexico”.

groups and citizens to contest or input feedback for education policies.<sup>9</sup> While democracy and political competition might have changed the central players it has not necessarily changed the rules of the game. The Mexican national education system is a large and complex, shaped by institutional legacies of corporatist relations between state and teacher unions, as well as a large and geographically uneven bureaucratic apparatus. Therefore, rather than witnessing unprecedented transformative changes to education as promised by all administrations under analysis, there are clear patterns of continuity. The complex autocratic legacy of the Mexican public education system, coupled with constant change of players, has limited the effect education is presumed to have with greater electoral competition and democracy.

## **Methods and data collection**

The primary argument advanced in this thesis is that even though democratization is widely associated with improvements in education, countries such as Mexico operate under contexts of weak policy institutions, which simultaneously facilitates alteration of the formal rules (e.g., serial replacement of education reforms and policies) and prevents policies oriented towards upgrade and quality to take hold in the long term. A secondary argument is that

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<sup>9</sup> To be clear, contestation from different groups within society have occurred over the years, before and after the democratic transition. However, the forms of contestation for education policy have mostly taken place the form of mobilizations and strikes organized by education workers, teacher unions and “normalistas” (the students at the public universities for teachers “escuelas normales”). Contestations are more sensitive to employment conditions in the public system rather than quality or performance as a whole (Echenique Vázquez, and Muñoz Armenta 2013; Bocking 2018; Hecock 2014; Levinson 2014). There was a large mobilization from education workers, normalistas and other social sectors after the forced disappearance and assassination of 43 normalistas in Ayotzinapa, Guerrero; in September 2014. It was a very public case of collusion between the government and the organized crime, given the formers efforts to hide the conditions of the event and obstruction of the investigation (Gravante 2018; Valencia Villa et al. 2015; Grupo Interdisciplinario de Expertos Independientes (GIE 2023). There has also been small scale university student protest related to incrementation of fees in public universities, but these have not been comparable in scale, level of organization nor spill-over effects to other national issues as the ones seen in recent years in Chile (Guzmán-Valenzuela 2016; Fairfield and Garay 2017; Cristián Bellei and Cristian Cabalin 2013), Colombia (Cruz Rodríguez 2013; Duque 2022), or South Africa (Ndlovu 2017; Cini 2019), to name some.

increased electoral competition at the federal level has produced an unstable political context to operate in, as it transforms leadership and divides bargaining power (both formal and informal) among different actors with distinct preferences over education policy in each administration.

Tertiary education is purposefully left out of the scope of analysis. Consequently, the analysis is focused on primary, secondary, and upper-secondary levels. Primary, secondary, and upper-secondary levels compromise the largest share of the national public education system. Furthermore, most of the content of education reforms since 2006 have focused on these levels of education. Reforms at these levels have largely focused on modifying the curriculum, compulsory years of education, as well as funding responsibilities and working conditions for teachers.<sup>10</sup>

My arguments will be assessed by analyzing and identifying changes across three dimensions across all three federal presidential administrations of the democratic period covering the years from 2006 to 2022. The first analytical dimension examines the narratives and discourse used by key stakeholders and policymakers of the different political parties at the federal level. These include the expressions and wording used for the aspirational transformation of the education sector during the electoral campaign and the rest of their administrations. The focus of my analysis remains at the federal level, because even when some responsibilities for education have been passed on to state governments regarding teacher hiring and curricular specificity (Hecock 2006), education in Mexico has remained

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<sup>10</sup> Tertiary education (higher education) only became compulsory by the latest education reform and was incorporated to the constitution on May 15th, 2019.

highly centralized by the Federal government (Bocking 2020, 217; 2015; Bonilla-Rius 2020). As consequence, the presidential and the broader party agenda are particularly relevant. This dimension looks at the language employed by elite actors in their public statements, interviews, electoral platforms proposals, and development plans.<sup>11</sup> The second dimension relates to the changes to the constitutional laws and articles that define the rules and operation of the Mexican Public Education System. This encompasses the 3<sup>rd</sup>, 31<sup>st</sup> and 73<sup>rd</sup> constitutional articles as well as the *Ley General de Educación* (General Law of Education).<sup>12</sup> The analysis includes amendments in the text, content, phrasing, and terminology by the three administrations. The third dimension encompasses education policies, actions, and programs implemented during each one of the federal administrations. These are focused on teacher and school evaluations, standardized testing, cash transfer programs for students, and general curricular modifications.

Since this research project looks at the effects of democracy, it will purposely exclude the first presidential term of Vicente Fox from 2000 to 2006, considered as the democratic transition after the one-party rule of the PRI. The Fox administration falls into a different category as one of transition from autocratic to democratic rule, rather than one facing the heighten electoral competition within a stronger electoral system. Each administration after 2006 is treated as a unit of analysis and is analyzed through the previously defined dimensions. Additionally, I set a limit on the year 2022 as the MORENA administration is

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<sup>11</sup> The sample of “elite actors” analyzed is established as: president, political party leaders, the secretaries of education (appointed directly by the president without need for senate ratification), elite bureaucrats within the education secretary e.g., the sub-secretaries for elementary and secondary education; and the heads of the commissions for education in the congress (both in chamber of senators and chamber of deputies).

<sup>12</sup> Hereafter referred to as LGE.

scheduled to conclude in December 2024, and consequently would not have the same level of archival material as the other administrations at the time of conclusion for this research.

To be clear, the comparison of the three different administrations is not one that I anticipate will yield differences related to regime type and regime behavior. Until the 2018 elections, Mexico was considered to have one of the most institutionalized party systems in Latin America. The country has not experienced any significant democratic backsliding despite a deterioration in its security situation, increasing inequality, and human rights degradation (Castro Cornejo 2022b; Talanquer 2020; Greene and Sánchez-Talanquer 2018).<sup>13</sup> All three administrations competed in stable electoral cycles after the democratic transition in 2000 and did so with distinct electoral platforms. Thus, the comparison between these three-party administrations is not about regime-type variation but rather about the changes in the national political dynamics, power configurations and impact on education policy (if any). This research operationalizes these three administrations as units of analysis to show that even when the conditions of democracy are in place (e.g. capacity for parties to compete, concede defeat and pool of multiple parties to choose from); the assumed benefits of democracy for the delivery of public services, particularly education, are not always evident.

The preliminary observation is that in Mexico electoral competition does not have a positive effect on education policy because education governance is highly centralized in nature. That centralization is evidenced as electoral competition alters stakeholders' alliances without changing the policy institutions and practices that were put in place during the autocratic PRI

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<sup>13</sup> Conditions of democratic competition are in place, and there has not been attempts by the military nor elites to overthrow federal governments.

rule. There is informal power sharing over education governance between elite actors such as the teacher union leaders, elite education bureaucracies, and businesses. Thus, education is a policy item that remains shaped by these informal policy negotiation dynamics rather than by the electorates preferences over education policy (Hecock 2014; B. W. Ansell 2010). Education in Mexico is a policy item operated under informal groups of power in which none of them have a clear majority to overpower the others (Scott et al. 2014).

## **2. Theoretical Discussions**

Education as a political object of study is often seen as a social policy sector surrounded by a “normative halo” (B. W. Ansell 2010, 129; Doner and Schneider 2016, 629). It is supported by a near universal consensus among disciplines, academics, policymakers, technocrats, and the public that education is essential and should be guaranteed for citizens.

Therefore, education is a central policy item for incumbents and political contenders of every political stripe, at least in discourse, both during the electoral periods and during their terms. Education is also theorized as an essential component of both nation and state capacity as it requires organized bureaucracies for service delivery (Kurtz 2013; J. C. Scott 2008; B. Ansell and Lindvall 2013). Education has helped foster stability and cohesion at the domestic level (Kurtz 2013; Cook 1996). Additionally, the development and expansion of education systems assisted countries to comply with the model of western governance of nation-states predominant after the Second World War. However, at its initial stage of policy borrowing in governance structures, the quality component of education was neglected by countries as they gave priority to “service provision ” and coverage (B. W. Ansell 2010, 13; Moe 2016, 269).



Developmental paradigms of “skills regimes” (B. Ansell and Lindvall 2013, 2), theorized education as a mechanism of social and economic advancement that supply countries with qualified human capital, boost competitiveness, economic development and market integration to global economies (B. W. Ansell 2010; B. Ansell and Lindvall 2013; Ashton et al. 1999; Doner and Schneider 2016; Haggard and Kaufman 2008). Later at the turn of the century, there was a deeper global concern regarding education quality. As in, education was rephrased in the vocabulary and discourse of national and international agendas as a factor for social inequality.

In the 1990s, there was a proliferation of programmatic blueprints and recommendations for education policy led by intergovernmental organizations such as the United Nations, the World Bank Group, and the Organization for Economic Co-operation and Development. This global wave of education policy called for better quality and equality, but it also served to foster a type of governance normativity in education policy. Assisted by the consolidation of a neoliberal world order and international organization loans to improve education, education was to be measured by indicators such as efficiency, cost-effective resource allocation and standardized testing to assess quality (María Victoria Murillo 1999, 33; Ornelas 2019; Weyland 2009; Bocking 2020; Miller 2016).

From a social justice perspective, improving education is an ongoing priority that modern nation-states should work towards, not only to reduce skill gaps among the population but also to increase equality and foster opportunities for social mobility (F. M. Reimers 2015; Gruber and Kosack 2014). Unlike other social policies such as health coverage, pensions, or social security systems, universal education is a policy area that tends to capture state

transfers and services for the entire population regardless of their employment status (Garay 2016, 19).

Education as a social policy is an essential component to achieve “social equity,” particularly during the consolidation of young democracies in Latin America (María Victoria Murillo 1999, 33). However, even though education is generally seen by political actors as a societal good, countries in Latin America have struggled to implement education policy in terms of "easy redistribution" and "hard distribution" which helps to account for why governments have distinct preferences for education policy at different times (A. C. Holland and Schneider 2017). A first mechanism of “easy redistribution” focuses mainly the expansion of coverage, making it relatively “easy” to build new schools and train more teachers with a pre-existing normative curriculum. On the contrary, "hard redistribution" requires improving the quality of services which can both resource and coordination intensive, as well as politically complex to achieve within as it puts more pressure on the education system workers and might trigger contestation (A. C. Holland and Schneider 2017; Doner and Schneider 2016, 618).

This characterization between easy and hard redistribution is useful to illustrate how education policy and education governance decisions in Mexico seem more sensitive to political rationales than economics ones. Political actors have multiple and simultaneous incentives to mold education policy according to their preferences and interests. In addition, public education systems are complex by themselves, shaped by interactions between policymakers at government different levels, parents, students, teachers’ unions, as well as bureaucratic and administrative personnel. For elected officials operating within democracies there is a pressing need to legitimize themselves to gain and/or retain office assuming a certain degree of accountability for service provision such as education. Nevertheless,

policymakers also operate constrained by institutional and resource limitations, as well as cleavages of power distribution within nationally organized groups such as political and economic elites, groups within civil society and teachers' unions (B. W. Ansell 2010; Levy et al. 2019; Doner and Schneider 2016; María Victoria Murillo 1999; Cook 1996; Hecock 2014).

For analytical purposes and seeking to enhance clarity, this research cannot conceive education as a uniform and homogeneous policy item. Contrarily, it anticipates variation across different aspects of education policy, such as: impact on education levels; budgetary distributions; normative laws; curriculum; professional development of teachers; and education complementary programs. Said variation is related to preferences among actors. Spending and budget allocation across the primary, secondary, and tertiary levels within the public education systems are an example of this. Public education funding is deeply related with distinct fiscal redistributive effects that create tensions between the population sector that pays for them and the population sector that benefits from it (B. W. Ansell 2010; Gruber and Kosack 2014).

A second example is based on the arguments that policy alterations concerning curriculum included in “quality-oriented reforms” have impacted educators' professional conditions as they put expectations for improvement on the service delivery standards while operating with constrained resources for compensation of overtime or available trainings (Agren 2018; Bocking 2018; Joong 2022; Bonilla-Rius 2020). Accordingly, “quality reforms” tend to be more politically sensitive as they often trigger conflicting dynamics between policymakers,

education bureaucracies, and the teachers' unions (Bocking 2020; D. Scott et al. 2014; Doner and Schneider 2016; Islas, Calef, and Aparicio 2021; Bonilla-Rius 2020).

### ***Democracy and education***

A large scholarship on democracy and electoral competition assumes that electoral competition within democratic political systems will represent an aggregation of voters' preferences on policy items (B. W. Ansell 2010). The logic is that competitive elections and the realistic fear of losing office based on performance are a strong incentive for incumbents and challengers alike. Once in office, the assumption is that elected officials are vulnerable to accountability on performance by an electorate that assesses whether campaign promises are met (Kadt and Lieberman 2020; Cleary 2007). Hence, the electoral process shapes the strategies politicians will employ to mobilize political support and electoral competition compels incumbents to distribute public spending to a wider segment of the population to broaden appeal (Brown 1999, 684; Stasavage 2005; Gruber and Kosack 2014).<sup>14</sup> Democracies, especially new ones, whether motivated by developmental goals or by the pressing need for legitimacy of public service provision, will often try to act on measures required to expand education access and enrollment. In other words, politicians in new democracies find the “easy redistribution” strategies more appealing (A. C. Holland and Schneider 2017; Harding and Stasavage 2014).

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<sup>14</sup> Democratic regimes even when operating in contexts of weak electoral and democratic institutions, have greater incentives to provide services demanded by the entire population than their autocratic counterparts, consistent with the argument that the way public services such as education are redistributed in democracies is geared toward the preferences of electoral majorities (B. W. Ansell 2008; Hecock 2006; Harding 2020; Brown and Hunter 1999)

At times, comparative politics scholarship has dismissed the effective value of electoral competition in developing regions. Poorly defined programmatic political parties, pervasiveness of clientelist networks, overall corruption and lack of accountability for elected officials diminishes the value of electoral competition for social policy delivery (Stasavage 2005; Weyland 2009; J. C. Scott 1972, 107). Focusing on the Sub-Saharan region, Stasavage found that electoral competition does provide an incentive to rulers to dispense more public services even in environments of weak electoral and policy institutions, but that the way public services such as education are allocated across social sectors will depend on the voting bloc that could benefit from it (Stasavage 2005). Accordingly, education provision and education spending are linked to geographical location of voters (e.g., urban versus rural). Incumbents and challengers will try to appeal to the preferences of the population that could better support their election (Stasavage 2005; Harding 2020; Harding and Stasavage 2014).<sup>15</sup>

Brown sustains that even when democracy is relevant for education expansion, the specific way in which democracy affects education will be moderated according to the different social classes of the polity, their preferences, and the level of access different classes have to political institutions (1999). Further expanding this idea, there is a warning that the lower classes might only benefit initially from democratic transition when primary education expansion and creation of schools' programs take place (Brown 1999; Doner and Schneider 2016; Harding 2020).

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<sup>15</sup> Stasavage shows compelling evidence that for several Sub-Saharan countries, the transition to democracy in the third wave did foster multi-party competition leading to overall larger education spending, especially on primary education as it was the item preferred by large numbers of poor and rural voters, while leaving tertiary education unchanged as it was preferred by a smaller more privileged sector in the urban areas (Stasavage 2005).

At later stages of democratic consolidation, education disproportionately benefits the middle and upper classes whose members' primary interests are set on directing state funding to subsidize tertiary education. Middle and upper classes are better positioned to make political demands as they have greater access to policy institutions (Brown 1999; Gruber and Kosack 2014). The levels of social and economic inequality are a key component of this problem. If there is unequal access to political institutions and the class interests of the upper and middle classes is better organized, democracy might not produce an equitable impact through education in the long term.

This scholarship suggests that the initial expansion of universal education for the poorest needs to be complemented with social and economic strategies to foster social mobility. Otherwise, tensions can potentially arise in the future when poor households face limitations for their children to gain access to a seat in tertiary education and/or limiting funding for private educational options (Brown 1999, 686; Gruber and Kosack 2014). Therefore, even when democracy transition might appear to positively impact education expansion is necessary to look beyond this initial stage. An excessive focus on basic education expansion might fail to bring to light the conditions of inequality that will likely limit education access to the tertiary level and social mobility.

I argue that nascent electoral competition in developing regions, even when they have weaker democratic institutions and higher levels of inequality, do create incentives for elected officials to provide services demanded by the entire population (B. W. Ansell 2008; Stasavage 2005; Hecock 2006; Harding 2020). However, the way that public services such as education are distributed is not only geared to the preferences of electoral majorities, but also to

business national elites and other actors that hold informal power.<sup>16</sup> As previously mentioned, education policies that aim to improve school quality do not affect electoral support, although they might trigger contestation from the education sector professionals and unions. Conversely, policies that reduce school fees and support cash transfer programs, resonate deeply with general voters and face less resistance for implementation (Coady and Parker 2004; Hecock 2006; Harding and Stasavage 2014; Guichard 2005; Teichman 2009; De La O 2015).<sup>17</sup> As pointed out by Doner and Schneider “the costs of building schools and hiring teachers are low, and political benefits are high” (Doner and Schneider 2016, 22).

A crucial issue when studying the link between democracy and education is that a large body of international reports and scholars do so through macro indicators of education spending per education level, education spending as a percentage of the GDP, and education attainment, through snapshots before and after democratic transition. Yet as Hecock argues, the “nature of legislative process amid competing leaders, parties, factions and interests is slow and not conducive to the rapid rewards often expected with the democratic transition” (63, 2014).

### ***The role of policy institutions and policymaking for education***

Formal institutions, understood as “the set of officially sanctioned rules that structure behavior and expectations around activities or goals” (Brinks, Levitsky, and Murillo 2019, 8) have

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<sup>16</sup> The demands of organized interests including business associations, labor unions, and social movements may be much more pressing for policymakers than median-voter preferences” (Fairfield and Garay 2017, 1875; Hecock 2014; D. Scott et al. 2014; Cleary 2007; Camp 2012)

<sup>17</sup> Harding and Stasavage found that electoral accountability in the context of developing regions is complex as voters might not be able to identify nor associate the specific political party or levels of government responsible for the policies implemented (2020 Education expansion policies and cash transfer programs for education however, are easily verifiable. Even if the new school is poorly funded or the cash transfer programs does not solve the economic hardships (Harding and Stasavage 2014; Harding 2020).

often focused on political constitutions, democratic institutions, electoral systems, impartial electoral commissions, presidential figures, levels of independence of the judiciary branch and overall the power relations between the legislative, executive and judicial powers (Doorenspleet and Nijzink 2014; Przeworski 2012; Abdullah 2019; O'Donnell 1994). Scholars often use conceptual and normative checklists on how electoral institutions and competitive elections in democracies should operate, e.g., institutionalization of the party systems, representation of social groups, cohesive and programmatic goals, venues for “social construction of class interest” and the articulation of political demands by citizens (Huber and Stephens 2012, 26). However, much less attention has been devoted to the role of informal power and weakness of institutions at a more tangible level of political outcomes other than regime transitions: public policies (Weyland 2009; Levitsky and Murillo 2013; O'Donnell 1994; Helmke and Levitsky 2006).<sup>18</sup>

In Mexico and Latin American despite having stronger electoral institutions, competitive elections, and relatively stable political systems significant gaps remain between what is formally stated by the political parties and policy institutions and what is in effect delivered to the population. Those delivery gaps have profound consequences for the entire polity, especially in a region where inequality and vulnerable groups often lack access to and are unable to change policy institutions (Fairfield and Garay 2017; Kapiszewski, Levitsky, and Yashar 2021; Weyland 2012, 142; Levitsky and Murillo 2013; Htun and Jensenius 2020; Teichman 2009; O'Donnell 1994).

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<sup>18</sup> Weyland argues that a lot of the literature on weak institutions in developing regions had a strong contextual focus on the third wave of democratization and was bounded to the analysis of institutional deficiencies as proxy for potential backslides into authoritarian regimes, narrowing the scholarship on institutional strength to constitutional and electoral rules' stability against the “turmoil” characteristic of the Latin American region for breakdowns of constitutional order in previous years (Przeworski 2012, 547; Weyland 2009; 2012)



Brinks, Levitsky and Murillo have argued that institutional weakness can be understood across three dimensions that help us understand how actors comply with rules (2019). First, they identify rules that actors comply with but do not significantly change their behavior. Second, non-compliance remains a widespread phenomenon, in which rules exist but actors chose to enforce them discretionally, often using these rules for aspirational reasons or as window dressing policies to gain or maintain international reputation (A. Holland 2017; Htun and Jensenius 2020; Spiller, Stein, and Tommasi 2008). Third, rules are unstable change at unusual unpredictable rates, such as the fast replacement of public policies in short and often unrealistic time frames (Levitsky and Murillo 2013; Brinks, Levitsky, and Murillo 2019; Spiller, Stein, and Tommasi 2008; Franco and Scartascini 2014). Furthermore a state with weak policy institutions does not work the same way for everyone and the limits on access to institutions will be experienced differently by diverse groups reproducing inequality among members (Kapiszewski, Levitsky, and Yashar 2021, 4; Garay 2017; A. C. Holland and Schneider 2017). Doner and Schneider anticipate that getting out of the “middle-income trap” for countries like Mexico is difficult as it politically requires “institution-intensive policy solutions” (2016, 611). Yet pervasive inequality tends to split interests and divide social sectors and elites, making coalitions among different groups difficult to articulate into common demands (Doner and Schneider 2016; Camp 2012).

Electoral competition in the context of stable electoral institutions and weak policy institutions often results in constant bargaining and alliances for implementation and

operationalization of policy.<sup>19</sup> Some of the present-day political parties in Latin America are portrayed to be “newer and weaker,” lacking coherent programmatic design and ideological commitments to their constituencies, which makes their party manifestos poor predictors of actions and policy preferences after the electoral period.<sup>20</sup> As an additional component to understand the environment for electoral competition is that Mexico (similar to the Latin American region) is experiencing increasing electoral abstention combined with an overall decline of trust in politicians and democratic institutions (Córdova Vianello et al. 2015; Romero Ballivián 2020; Castro Cornejo 2022b; Weyland 2012, 146; Gómez Tagle and García Eduardo 2021; Instituto Nacional Electoral 2019; Sol Miguel 2020; Atienzo et al. 2020a). Political parties lose reputation based on their poor performance, so it has become more and more common to fragmentate and multiply into “new” ones. Therefore, the proliferation of parties creates more contenders competing for the same pools of votes.

This makes political parties more reliant on clientelist networks than clearly defined ideological components established in policy platforms (B. W. Ansell 2010; Fairfield and Garay 2017; Huber and Stephens 2012, 26; Weyland 2012, 146). Examples of this ideological dilution and blurriness include politicians changing between parties when they are unsatisfied with their prospective nominations, party coalitions between long standing political party “ideological rivals” to compete in the same ballot for state and/or municipality

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<sup>19</sup> Especially for social sectors such as public education and health, the service delivery needs effective cooperation between the state and the providers for implementation of policies and deployment of resources and activities (Weyland 2009).

<sup>20</sup> As an example the anticipated leftist connection to social policy expansion transformations during the Latin America “left wave” have been widely challenged by scholars such as Garay, Holland, Balan & Montambeault, and de la O (Balan and Montambeault 2020; Garay 2016; Fairfield and Garay 2017; De La O 2015). As their arguments note, the expansion of social policies does not match tidily with the timing of the left turn, supporting that some Latin American governments regardless of their ideological spectrum tend to enforce and expand social policies when facing electoral competition. A second argument emphasizes that ideological assumptions of party behavior based on left-right characterizations cannot be used analytically to predict actions of political forces and behavior once in power (Balan and Montambeault 2020; Garay 2016; Fairfield and Garay 2017; De La O 2015)

elections, and distribution of electoral districts in exchange for plurinominal seats in the congress.<sup>21</sup> An illustrative case is the *Vamos por México* electoral alliance of 2021, 2022 and 2023, formed by the PAN, PRI, and PRD to compete together against MORENA. This proliferation and changing political alliances derived from higher electoral competition debilitate programmatic and party ideology by focusing on securing votes rather than fostering deeper connections between the formal party ideologies and their constituencies.

### ***Weak Policy institutions***

Policy institutions are expected to provide a certain degree of stability, such as information, and predictably for political actors, but their level of strength and/or weakness will tend to shape diverse social, political, and economic outcomes (Levitsky and Murillo 2013). Political stability has been maintained over the years in Latin America and the cost of democratic backsliding is higher for elected officials as argued by Weyland, since neoliberalism and the predominant western liberal state model have worked as a stabilizers after the third wave of democratization (Weyland 2012). In addition to the abundant literature on regime change in the region and elsewhere, there is an analytical opportunity to further explore weak policy institutions and their impact on social policies provision as political phenomenon (Levitsky and Murillo 2013; Htun and Jensenius 2020; Weyland 2009; 2012).

Environments of weak policy institutions affect the perceptions of risk and certainty for politicians and elite bureaucrats. Since their terms are limited by tight time horizons, there is

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<sup>21</sup> Plurinominal refers to the principle of proportional representation for election of 200 congress people and 32 senators in both legislative chambers.

a pressing need to make policy changes and boost their careers as soon as possible. This leads to fast policy change and replacement, which often turns to be detrimental and disruptive (Spiller, Stein, and Tommasi 2008; Weyland 2009, 47). This problem is sometimes exacerbated by the fact that senior cabinet figures, and particularly in education, are appointed by the president based on political loyalty rather than sector specific experience. Thus, the secretaries tend to accept the positions for the potential reputational benefits to later run for office themselves, even when unfamiliar with the sector they are assigned to (D. Scott et al. 2018; 2014; Chambers-Ju and Finger 2016).<sup>22</sup>

When policy institutions are strong, the laws and regulations that govern the political system are assumed to remain isolated from personalistic and private interests. Conversely, when policy institutions are weak, the political system experiences frequent policy changes. As each federal party in power seeks to leave their own mark in education as a “crowd pleasing” policy item, they introduce reforms, programs, and changes that do not necessarily transform education as intended since such changes are shaped by short time horizons. Weak policy institutions also provide larger spaces of action and power for actors participating informally in governance of education policy; thus, when actors constantly change due to rotation and heighten electoral competition, the alliances are likely to be reshaped.

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<sup>22</sup> The most recent example is Delfina Gómez Álvarez, appointed Federal Secretary of Education between 2021 and 2022 by President Andrés Manuel López Obrador. She stepped out of the office to run for congress and in June 2023 she became the first elected governor in Estado de México, one of the largest federal states in terms of population. It is the first time in history that a PRI governor loses office in that state. Josefina Vázquez Mota was Secretary of Social Development during the six years of PAN president Vicente Fox and then Secretary of Education between 2006 and 2009. She ran for presidential office in 2012 by the PAN and as a candidate for governor of Estado de Mexico in 2017.

Finally, in a context of weak policy institutions where political parties in office are not seen as programmatically and coherent institutionalized units, the distinctions between the left and right and core constituencies become blurred. This can foster clientelist networks and a core interest in fostering alliances with large groups such as teachers and education workers' unions (Weyland 2009, 13; Fairfield and Garay 2017).

In Latin America teachers have been historically more active than other private and professional union sectors. For one, teachers in the public sector are directly employed by the state, making them a “relatively homogenous group” (María Victoria Murillo 1999). They can easily disrupt normalcy and their bargaining strategies vis a vis the state are different than that of other professional unions (María Victoria Murillo 1999; Hecock 2006, 955; Doner and Schneider 2016). Teacher unions can either ally and form coalitions with ruling parties in an attempt to access to policy formulation and feedback provision, or conversely, disrupt the social order with their capacity to mobilize members to pressure the government and paralyze classroom activities (Huber and Stephens 2012; Maria Victoria Murillo 2001, 12; Islas, Calef, and Aparicio 2021; Hecock 2014; Martínez Carmona and Gómez Zamarripa 2021). However, there is no clear evidence for the theoretical partisan connection between left-wing parties and teacher labor unions in Mexico. Evidence from the country shows that teacher union leaders tend to align with clientelist networks rather than ideological affinity with political parties (Fairfield and Garay 2017; Roberts and Levitsky 2011; Pierson 1993).

This research project advances the arguments that: First, even in democracies where stable political systems and electoral institutions are in place such as Mexico, education policy tends to be more dependent on political negotiations than programmatic plans. Second,

fostering short term policies such as expansion of the system and cash transfer programs is generally preferred for electoral appeal and reputational gain, whereas quality intensive policies, even when desirable, are more politically costly and could take decades to see the results and harvest electoral support from them. Third, democracy does tend to initially impact education policy on primary and secondary levels, but when other factors of social and economic inequality remain unaddressed, the developing effects of education will be limited. Fourth, given the increased electoral competition among political parties, ideological positioning is not to be taken as a predictor of preferences in social policy although might be more relevant for economic policies (Fairfield and Garay 2017).

### **3. Mexico as the case study**

Mexico is considered a democracy since its transition from a competitive authoritarian regime and the victory of the opposition in 2000. Electoral institutions have been able to guarantee both competitive elections and alternations in power at all levels of government through free elections, along with fostering institutional conditions that guarantee political and civil liberties (Talanquer 2020, 404; Castro Cornejo 2022b; Bogaards 2009; Bunce and Wolchik 2010, 44). Additionally, up until the elections of 2018 the political party system was regarded as a highly institutionalized one in the Latin American region, although mostly based on the capacity of the three dominant parties to mobilize voters support than by a strong voter affinity to ideological components (Castro Cornejo 2022b).<sup>23</sup> As an example, the center-left Party of Democratic Revolution (PRD) was one of the three major contenders for federal office since its foundation in 1989, but has only produced two presidential candidates

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<sup>23</sup> The three historical dominant parties were PRI (center), PAN (center-right) and PRD (center-left).

until the 2018 elections.<sup>24</sup> Thus the “Mexican left” was mostly composed by “PRI dissidents members and some leftist leaders,” suggesting that its creation derived from disagreements within the PRI rather than a strong constituency represented by the ideological appeal of the left (Cleary 2007, 40; Greene and Sánchez-Talanquer 2018; Mainwaring 2018).

The widespread violence, prevalence of drug cartels, alarming rates of feminicides, forced disappearance, assassinations of journalist and activists, pervasive inequality, corruption scandals and high levels of impunity signal deep governance shortfalls in the country. These governance shortfalls impact the satisfaction of citizens with the options for political representation (Htun and Jensenius 2020; Castro Cornejo 2022a; Sherry 2015; Garay, Palmer-Rubin, and Poertner 2020; Castro Cornejo 2022b; Atienzo et al. 2020a). However, even when Mexico does have institutional capacities in place to guarantee electoral competition, the importance of party ideologies for electoral competition and the mobilization of voters is not as clear (Talanquer 2020, 404).

Every federal electoral cycle resonates more with voters disappointment with the ruling party and unmet expectations rather than ideology alignment with alternative party platforms (Castro Cornejo 2022b, 1). In short, the ongoing rotation of parties is a result of both higher electoral competition and poor governance performance. To further illustrate heightened levels of electoral competition, two out of the of the three administrations under analysis in this thesis won the presidential office with less than 40% of the votes at the national level.<sup>25</sup>

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<sup>24</sup> Cuauhtémoc Lázaro Cárdenas Solórzano for the 1988, 1994 and 2000 presidential elections. Andrés Manuel López Obrador did his first and second electoral run in 2006 and 2012 respectively as a candidate from the Partido de la Revolución Democrática PRD (Party of the Democratic Revolution). The PRD is consider a center-left party (Hecock 2006, 954; Teichman 2009; Cleary 2007). For the 2018 election, Andrés Manuel López Obrador ran for the presidential race with the National Regeneration Movement (MORENA) born as a civil society in 201 (Martínez Gil 2014). In the 2018 elections the PRD competed in the coalition “Por México al Frente” (Mexico at the Front) supporting PAN candidate Ricardo Anaya.

<sup>25</sup> Mexico has a direct voting system and does not require a second electoral round if the first one yields less than 50% of the votes for the leading candidate. Presidents Francisco Calderón Hinojosa by the Party of National Action (PAN) and

Andrés Manuel López Obrador won for the MORENA party with 54% margin in the 2018 elections (Instituto Nacional Electoral 2018). No party so far has been able to leave the federal office with higher ratings of approval than when their administrations first started.<sup>26</sup> Mexican electoral competition displays “important signals of the decay of party roots in society” and electoral disenchantment (Castro Cornejo 2019, 5; Greene and Sánchez-Talanquer 2018). In addition, despite the development of strong electoral institutions to manage political contestation, “the bulk of the governing apparatus was left untouched or reformed only incompletely following democratization” and “most public bureaucracies remain understaffed, underfunded, and unprofessional” 9/27/2023 1:11:00 PM.

Younger generations of Mexicans are receiving more years of education than their parents and grandparents, and yet opportunities for economic and social mobility anticipated with higher educational attainment remain low. The expansion of the public education system has not translated into “better educational outcomes” for Mexico in terms of the quality of education services (Islas, Calef, and Aparicio 2021; Bocking 2020; Hecock 2014, 62; Moe 2016; Atienzo et al. 2020a). The shortfalls in social mobility can be partly attributed to the national economy’s incapacity to absorb educated individuals in the labor market (B. W. Ansell 2010; Doner and Schneider 2016).<sup>27</sup> There is a gap between the skills provided by the

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Enrique Peña Nieto by Party of Institutionalized Revolution (PRI) won the office with 39% of the votes at the national level (Instituto Federal Electoral 2006; Tribunal Electoral del Poder Judicial de la Federación 2012)

<sup>26</sup> The continuation for a second term by the PAN administration in 2006 was highly closed at the polls with a 0.58% margin of votes, leading to the then PRD candidate to mobilize protest and calling out for recounts in the capital (Instituto Federal Electoral 2006; Cleary 2006). Even so, the victory of Francisco Calderón Hinojosa (PAN) in 2006 tends to be regarded as a preference for moderation and fear of leftist figures such as Hugo Chavez in Venezuela than electoral satisfaction with the PAN administration of Vicente Fox (2000-2006) (Cleary 2006, 36)

<sup>27</sup> Streaming refers to the splitting of secondary education into vocational and academic paths. The assumption is that when streaming is complete and functional, users might opt out of the tertiary education level and trade it off for immediate employment and income, although limiting their chances of access to tertiary education which is also assumed to be rewarded in the future with more opportunities for employment and social mobility (B. W. Ansell 2010; Doner and Schneider 2016).



public education system and those demanded by the labor market, combined with a large informal economic sector in the country. Even with more prospects of education today, socioeconomic factors drive children, teenagers and young adults into subemployment, unemployment or desertion from education altogether (Guichard 2005; Zubieta García et al. 2015, 107–8; Arnaut and Giorguli 2010; Bruns, Macdonald, and Schneider 2019).

Second, regarding the quality of public education which represents 90% of the national education system, there is a combination of deficient inputs at the education system. These range from inadequate facilities, limited training and salaries for teachers; and the number of student per teacher ratios in the classroom (Bocking 2020; Islas, Calef, and Aparicio 2021).<sup>28</sup> Additionally, the quality of public education and consequently the learning outcomes for students are deeply influenced by geographical location and socioeconomic background. Deep cleavages between urban and rural as well as richer and poorer regions prevail to this day, reproducing inequality within the country (Hecock 2014; Bocking 2020; Tapia G and Valenti 2016; Atienzo et al. 2020b; Zubieta García et al. 2015, 93–97; Márquez Jiménez 2016).

Third, education remains a highly ranked policy item on a rhetorical level and is outlined as a programmatic priority of all the political parties contesting the presidency. However, education policy is often characterized in opposite spectrums. It is as either an item trapped in a serial policy replacement loop of ambitious transformations in short implementation time

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<sup>28</sup> Out of the Mexican between ages of 3 and 29 years, 90% are enrolled in public institutions (INEGI 2021b). Dissagregated per level, 89.2% of preschoolers, 92.7% of primary students, 91.4% secondary students, 86.8% of upper secondary education students and 76.3% of higher education students attend to public education institutions (INEGI 2021b). The presence of the private sector in indigenous, community, technical secondary education and “telesecundaria” (television broadcasted middle school often used in rural communities) is practically non-existent (Instituto Nacional para la Evaluación de la Educación (INEE). 2019)

frames (Weyland 2009; Levitsky and Murillo 2013; Bocking 2020; Suárez 2018). Or, as a policy item impossible to modify since has been taken hostage by powerful veto players such as teachers unions that oppose and block any meaningful attempts to upgrade policies oriented towards quality (Hecock 2014; Bocking 2020; Hecock 2006; D. Scott et al. 2014; Prados 2012).

### *Education governance in Mexico*

As electoral competition has increased over the past three electoral cycles, the federal elected officials seem keen to obtain fast legitimacy by announcing changes to education almost immediately after taking office.<sup>29</sup> The education narrative of each administration is first established at the party electoral platforms. Once the new president comes into office, the electoral platform is presented as the *Plan Nacional de Desarrollo* (National Development Plan) to the congress.<sup>30</sup> At the policy level, there are *Programas Sectoriales* (Sectorial Programs) which contain policies, strategies and actions for federal secretaries and bureaucratic bodies.<sup>31</sup> Despite of the very centralized nature of education governance in the executive power, education policy processes required negotiations with the legislative chambers to enact reforms, programs and budget allocations (Nacif 2012). In this matter,

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<sup>29</sup> The increased electoral competition can be evidence by the margin of victory between presidential candidates: For the 2006 presidential elections, the PAN represented by Francisco Calderón Hinojosa won over the PRD Andrés Manuel López Obrador with a 0.58% margin of votes (Instituto Federal Electoral 2006); the 2012 election was won by the PRI candidate Enrique Peña Nieto with a 6.76% margin over the progressive coalition candidate Andres Manuel Lopez Obrador (Tribunal Electoral del Poder Judicial de la Federación 2012); and finally the 2018 elections were won by the MORENA party Andrés Manuel López Obrador in its third consecutive run with 32% margin over the next voted candidate by the PAN Ricardo Anaya (Instituto Nacional Electoral 2018)

<sup>30</sup> Guiding document in which the Government of Mexico, through public consultations and bureaucracy contributions, explains what its objectives and priority strategies are during the six-year term administration along the central axes of 1. Government and Politics, 2. Social Policy and 3. Economy. It is submitted by the executive and approved by the legislative power. The executive presents results to the congress and legislative power on a yearly basis known as the “Informe Anual de Gobierno”.

<sup>31</sup> The Secretary of Public Education (SEP) has the constitutional mandate to coordinate the publication, execution and follow up on the Sectorial Program of Education.

heighten electoral competition also affects the party configurations in congress. As a result, the formal and informal alliances between actors for education governance and policy are also altered by constant party rotations in the legislative power.

The PAN administration announced the “Pacto por la Educación” made directly between the administration of Calderón and the then union leader of the *Sindicato Nacional de Trabajadores por la Educación* SNTE, Elba Esther Gordillo.<sup>32</sup> The PRI administration negotiated a package of reforms between the three largest parties at the time (PAN, PRI, PRD) known as “Pacto por México” to fast-track reforms the legislative chambers (Fonseca 2012). This unlikely alliance between long standing politically rivals at the federal level framed the pact as a necessity “to unite the country” and set progress in motion.<sup>33</sup> Finally, the current administration of MORENA made a pact to derogate the previous education reform with the dissident branch of SNTE, *Coordinadora Nacional para Trabajadores de la Educación* CNTE in exchange for electoral support in the 2018 elections.<sup>34</sup> National teacher unions have a historical role as co-opted allies of political parties or fierce challengers across administrations. They have capacity and organizational resources for mobilization, as well

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<sup>32</sup> National Union of Workers for Education, the oldest teacher unions in the country and one of the largest in the world . Hereafter referred to as SNTE.

<sup>33</sup> There were eight political parties represented in the congress as result of the 2006 Federal elections, seven for the 2012 Federal elections and nine for the 2018 federal elections (Instituto Nacional Electoral 2018; Instituto Federal Electoral 2006; Tribunal Electoral del Poder Judicial de la Federación 2012). Regarding the congress party composition, the biggest share of seats were held by PAN, PRI and PRD between 2000 and 2018. PAN and PRI only had relative majority in the congress for the 2006 and 2012 elections respectively. MORENA got absolute majority in the congress but lost it during the 2021 midterm cycle.

<sup>34</sup> Dissident factions came together to form the National Coordinating Council of Education Workers, hereafter referred to as CNTE (CNTE), which demanded better teacher wages and union democracy, Was originally conceived to be operate more democratically, give members larger representation as an alternative to the co-opted SNTE, is the second largest education union in the country with a strong hold in southern and western states of Oaxaca, Chiapas, Guerrero and Michoacan (Bocking 2018; Hecock 2006; Chambers-Ju and Finger 2016).

as protesting working conditions and blocking operationalization of education reforms when they have felt out of the dialogue (Glaser 2016; Chambers-Ju and Finger 2016).<sup>35</sup>

The increased electoral competition and changing alliances have altered the power configurations of teacher unions and their political leverage, which for decades used to be assumed to operate as a unified block (Hecock 2014). Teacher unions in Mexico more than anywhere else in Latin America have played a particular and central role, because of their large membership and their capacity to “project power into the electoral arena” (Chambers-Ju and Finger 2016, 216; Loyo 2019; Hecock 2006). The SNTE was created in 1943 as an effort by the then Mexican president Lázaro Cárdenas to portray more progressive visions in the party and build legitimacy by including different social sectors. However, the SNTE was soon integrated into the party structure and co-opted as a way to centralize and control the federal and state sections of education workers (Loyo 2008; Cook 1996). As the largest union of education workers in Latin America, its political alliance with the PRI helped sustain the party’s electoral machinery for decades.

Union leaders often supported reforms that could be considered at odds with the interests of their members in exchange for concessions from the government and patronage in the form of appointments in the high-level education bureaucracy, as well as discretion over hiring and promotions (María Victoria Murillo 1999; Bocking 2020; Chambers-Ju and Finger 2016, 216; Loyo 2019). After decades of a privileged corporatist relation with the state and

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<sup>35</sup> When studying decentralization reforms in the 1990s and the distinct teacher unions’ responses both in Mexico and Argentina, Murillo found that the relationship between state and teacher unions is twofold: union leaders will cooperate with partisan allies in government and resist policies when they are allied to the opposition. As for the state, politicians in power are prone to make concessions to union leaders to further prevent leadership competition within the teacher unions.

accumulated institutional and political power, the SNTE political leverage endured beyond the democratic transition through the Vicente Fox and Felipe Calderón administrations, giving the union the capacity to form different alliances with the three major political parties in an context of greater electoral competition, at least until the breakup with the PRI in 2013 (Cook 1996; Chambers-Ju and Finger 2016; Bocking 2020; Martínez Carmona and Gómez Zamarripa 2021).

Teacher unions in Mexico had been immersed in a sort of shared governance of education policy in Mexico for decades, but the expansion of the public education system and the increased electoral competition altered both the composition and interests of the Mexican teacher unions in forms can no longer be adequately explained by the scholarship centered exclusively around the corporatist years of the PRI. An interesting phenomenon about teacher unions in Mexico is that they are assumed to be the ultimate veto players in the political arena of education policy (D. Scott et al. 2014; Hecock 2006). Still, their power is highly dependent on the state structures and party alliances created to dispense patronage in exchange for electoral support (Hecock 2014; Bocking 2020). Moreover, scholars, policymakers, and technocrats alike tend to emphasize and blame the backwardness of the Mexican education system as an exclusive result from the entrenched power of teacher unions (Chambers-Ju and Finger 2016; D. Scott et al. 2014; Islas, Calef, and Aparicio 2021).

Nevertheless it is hard to deny that even though when teacher unions have engaged in patronage, clientelist networks and corrupt practices (Cárdenas Denham 2012; Glaser 2016; F. Reimers 2018), there are a significant number of teachers and education professionals that continue to look for venues for more democratic participation while denouncing the

worsening conditions of employment for the sector. Being a teacher in the public system is by no means an easy task. The salaries are precarious, classrooms are overcrowded, school physical and digital infrastructure (proven vital during the pandemic years) are outdated, there is a constant stress for “credentialism” and unpaid training demanded along with the devaluation of the teaching degrees provided by the *Escuelas Normales* (public teacher universities) and a constant political denouncing of their responsibility for the system performance (Bocking 2020; D. Scott et al. 2014; 2018; Guichard 2005; Fuentes-Molinari 2013).<sup>36</sup>

Mexico as a study case offers an opportunity to gain deeper appreciation for the challenges faced by middle-income countries inherent to upgrading education policies. The country possesses an environment of sustained electoral competition combined with highly variable party composition between electoral cycles. Specific to the Mexican education policy, Scott et al argue that the national power is “shared among various competing groups, none of which are able to obtain hegemony over others” which affects the implementation process and partially accounts for the degree of success or failure of different education reforms and programs (D. Scott et al. 2014, 85; 2018; Hecock 2014).

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<sup>36</sup> Escuelas Normales are the state regulated higher education institutions whose mandate is offering undergrad degrees in teacher training for primary and secondary education. The Escuelas Normales have been historically associated with active student activism and opposition to education policies and reforms, particularly in southern states such as Michoacan, Oaxaca, Guerrero, and Chiapas. The term “normalistas” comes from them and gained national and international traction after the forced disappearance of forty-three normalistas from Ayotzinapa, Guerrero, as mentioned earlier in the notes.

#### 4. Units of Analysis

Mexico as a middle-income country has a relatively large and young population, which makes its national education system one of the ten largest of the world.<sup>37</sup> The national education system is not only complex by its size but also by historic legacies that maintain its design as highly vertical, bureaucratic, and centralized (Soifer 2015; Arnaut and Giorguli 2010; Heredia and Razo 2016). Some efforts were made in the 1990s to provide more autonomy to states and transfer responsibilities over hiring teachers and their salaries, but authors argue the intention was to curtail national teacher unions' influence rather than a true effort for decentralization of education (Heredia and Razo 2016; Bocking 2020; Rodríguez Gómez 2015; Echenique Vázquez, and Muñoz Armenta 2013; Bocking 2015; Instituto Nacional para la Evaluación de la Educación (INEE) 2016).

##### *PAN administration (2006-2012)*

In the 2006 presidential elections Mexicans did not have a counter hegemonic party to vote out, which provided the PAN to position itself as the natural continuation to ensure the democratic consolidation. During the 2006 electoral campaign, the PAN employed messages around the need for party continuity to further strengthen democratic institutions and carry on with the national transformation promised by the first party alternation and end of autocratic rule in 2000 (Moreno 2007; Klesner 2007). Regarding the conditions of electoral

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<sup>37</sup> According to the national statistics institute census for 2020, Mexico has a population of 126 million people. Compared to other countries, Mexico ranks 11th among the most populous nations in the world. In addition, the population between the ages of 0-12 (children) add to a 24.95% whereas the population between 14-29 years of age represents 30% of the total (INEGI 2021a). With 36.4 million students, two million teachers, and almost 260 thousand schools between preschool and upper-secondary. (Bonilla-Rius 2020, 107; INEGI 2021b)

competition, this first post-PRI-regime election did split the anti-PRI vote into different ideological and policy-oriented blocs, with the PAN and PRD as the strongest contenders.<sup>38</sup>

More than any other administration under analysis, the 2006 presidential elections were determined by the electorate choosing between policy programs that resonated strongly with economic concerns and political stability (Moreno 2007). At that specific time, voters' assessments of the economy determined electoral preferences, in addition to concerns for rising leftist presidencies in Latin America. The media and political figures contributed to the characterization of Andrés López Obrador as the embodiment of the “dangerous left,” “populism,” and an overall threat to stability (Castañeda 2006; Klesner 2007, 12).

The electoral platform of Felipe Calderón Hinojosa was built on the motto “Progress for change”. It did so by constantly referencing the first PAN administration's achievements, and the need for the party to remain in power to extend the programmatic policy time frames. As in, the continuation of the PAN would guarantee national stability and contribute to more solid democratic and developmental results. The PAN of the 2006 elections framed the democratic transition as the initial step towards the Mexican democratic future, but for deeper and lasting transformation the PAN administration should carry on to rule the following presidential term. Development plans and policy documents produced by the PAN between 2005 and 2007, upheld the idea that Mexico was at that moment in a better political, social, economic, and institutional shape than it was in 2000 (Partido de Acción Nacional 2006; Presidencia de la República 2007). In addition, using the national media outlets and public

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<sup>38</sup> Klesner since “López Obrador's campaign offered a populist message” at a time where Latin American elections were seemed to be divided between Left and Right, he was typically placed in the category of candidates whose victory would reflect a “tilt to the Left” (Klesner 2007, 11). The national economic stability and the portray of figures like Hugo Chávez in Venezuela and Evo Morales in Bolivia by the media became one of the key decisive factors for Mexican voters.



platforms, both political and business elites claimed that Andrés Manuel López Obrador was a latent menace to democratic progress. The message produced was that Mexican stability would be at risk of “becoming a new Venezuela” and potentially backsliding into an authoritarian regime (Rieff 2006; El Universal 2018; Castañeda 2006; Castro Cornejo 2022b).

According to the National Plan of Development for this administration, the central pillars for the country would be geared towards a comprehensive agenda of development for Mexico of 2030. It outlined the challenges of the 21st century, and established the national affairs would be above any political interest to guarantee development supported in the values of democracy (Presidencia de la República 2007). The language used for education was geared towards “legitimizing democratization” as a national and social affair (Partido de Acción Nacional 2006; Presidencia de la República 2007; Secretaría de Educación Pública 2007). It emphasized the involvement of a wider set of actors beyond the state, such as parents, business sectors, and the participation of citizen councils in the education governance. It also promised to give a larger margin of participation to local governments through budget sharing between federation and states, giving more state autonomy on decisions concerning regional appointments in education bureaucracies, and some curricular flexibility pertinent to regional contextual needs (Ornelas 2008; Instituto Nacional para la Evaluación de la Educación (INEE) 2012; Presidencia de la República 2007). The idea behind this democratization of governance was to empower all the members of the education system that had been previously left out of decision-making and use them to identify specific needs to address

inequality in education.<sup>39</sup> Nonetheless, the effective implementation of the decentralization efforts and collaboration between the federation, states and non-elite actors was overshadowed by the *Pacto por la Calidad de Educación* (Pact for the quality of education).

In May 2008, the Federal Government of Calderón announced the pact with the SNTE, the “the Pact for the quality of education,” widely publicized in the media and national press as the “most transcendent agreement and potential reach for the future of education” (Loyo 2008; Ornelas 2008; Glaser 2016). However, for education experts and professionals the pact was not a satisfying result from the democratic incorporation of social sectors. Rather, the pact represented an elite driven agreement that neglected the role of the federal legislative body, state governments, as well as the education bureaucracy, teaching community, and removed the CNTE as a legitimate national actor of the education arena and dialogues (Navarro Gallegos 2009). The strategy was released as the central directive of the education sector, with ten broad aspirational axes and poorly defined action items, that “would be operationalized in due time” (Consejo Nacional de Fomento Educativo 2008); but “more than an educational proposal supposed a political agreement” (Bautista 2012, 25) .

The then leader of the SNTE Elba Esther Gordillo was considered the de facto chief of the education agenda in the country and was seen as a figure with informal veto power over policy design and implementation, at times at odds and in direct conflict with the then Secretary of Education Josefina Vázquez Mota (Hecock 2014; Huber and Stephens 2012; Bocking 2020).<sup>40</sup> The SNTE had fostered a decades long collaboration with the PRI

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<sup>39</sup> School district supervisors, principals, teachers, parents, and students.

<sup>40</sup> Eventually, Elba Esther asked for the removal of Josefina Vázquez Mota and Calderón accommodate her in the Secretary of Social Development (Figueroa 2013; Bocking 2020, 134), which also tends to be a Federal institution to launch political careers due its closeness with distribution of cash transfer programs for vulnerable sectors.

administrations under the autocratic rule. However, the state-union alliance not only survived the party change, but it thrived under both the PAN administrations of Vicente Fox and Felipe Calderón.<sup>41</sup> The SNTE provided the PAN electoral support and mobilization militants for votes in the 2006 elections in exchange for bureaucratic top positions, patronage and resource provisions (Bocking 2020; D. Scott et al. 2014; El País 2011; Aviles 2011). This renovation of the pact between the SNTE union and the federal government of Calderón signify the prevalence (rather than elimination) of informal political commitments for education policy. The power of the union extended and managed to secure political careers for union loyalists and elite family members, as well as top bureaucratic positions in the federal public service such as the Institute of Social Security and Services and of Government Workers and the Sub-Secretary of Primary Education.<sup>42</sup>

This administration essentially set to continue with the 2000-2006 PAN policy platform. More than a profound inclusion of democratic practices into the policy processes, education policy relied heavily (like its immediate predecessor) on a series of recommendations outlined by the international regimes of education and the United Nations Millennium Goals. In addition, it followed the guidance of the SNTE leader (Navarro Gallegos 2009). A deeper analysis shows that education programs and policies were essentially rebranded using new names and leaving the previous administration's goals unaltered (Instituto Nacional para la

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<sup>41</sup> The PRI co-opted and controlled the union within the state. With its nationwide membership, the SNTE also served as a political machine for the party and played a key role, and was assumed to be a unified voting bloc (María Victoria Murillo 1999) which provided clientelist rewards for union teachers and awarded positions and benefits within the bureaucratic structure of the Secretary of Education (Cook 1996; Hecock 2006).

<sup>42</sup> The son in law of Elba Esther Gordillo, Fernando González Sánchez was appointed in 2006 (Aviles and Poy 2006; Aviles 2011). This office is considered the most politically relevant of all subsecretaries within the Secretary of Public Education and second to the federal bureaucratic apparatus of education, since it covers the largest section of the system.

Evaluación de la Educación (INEE) 2016; Arnaut and Giorguli 2010; Martínez Carmona and Gómez Zamarripa 2021). To illustrate the former point, one of the most popular cash transfer programs of the administration “Oportunidades” (Opportunities), was in fact created as the program PROGRESA for Education, Health, and Food back in 1997 targeted at rural areas and indigenous communities by then PRI president Ernesto Zedillo. In 2002, the program was renamed “Oportunidades” in 2002 and the eligibility requirements were extended to beneficiaries in urban areas. During this time, the program also expanded coverage for students at the secondary and upper-secondary levels.<sup>43</sup> Under the 2006-2012 PAN administration, the program was able to expand to a larger number of people after a US\$1.25 billion contribution by the World Bank in 2010 (The New York Times 2009; World Bank 2010).

During this period, programs and goals related to education remained as they carried the design from its predecessors but were outlined with more realistic metrics of beneficiaries. Thus, the main strategy was to keep education policy as a continuation from first PAN administration.<sup>44</sup> The Calderón administration also kept in place neoliberal practices designed to incentivize schools’ competition for resources based on performance; as well as private-public financing schemes for infrastructure in exchange for tax concessions. The parameters for these additional resources for schools were defined through student performance in accordance with the results of the ENLACE, a national standardized test evaluation established in the previous administration by UNESCO’s recommendation (Rodríguez Gómez 2015; Bocking 2020). However, the standardized testing failed to

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<sup>43</sup> By presidential decree in 2014, it changed name again to “PROGRESA Program of Social Inclusion”/ “PROGRESS Program of Social Inclusion”; and then again in 2018 under the administration of López Obrador to “Programa de Becas de Bienestar Social Benito Juárez”/ “Benito Juárez Scholarship program for Social Wellbeing”

<sup>44</sup> Re-named program from the previous administration, “Enciclomedia”

consider socioeconomic and local conditions for the students taking it. As a consequence, better funded schools in large urban areas performed higher at the national level and were positioned to demand more resources (Bonilla-Rius 2020; D. Scott et al. 2018; Arnaut and Giorguli 2010).

Additionally, one of the most challenging aspects concerning the motto “evaluation to improve” was emphasized through standardized entrance exams for teaching positions and for temporary and low-seniority educators to obtain permanent status and/or promotion. Consequently, it limited the opportunities and access of employment for “*escuelas normales*” graduates as it removed the degrees of higher education in education as a mandatory prerequisite for obtaining a teaching position in the public education system.<sup>45</sup> The contests for teaching posts were handled with opacity and multiple cases of corruption such as distribution for new vacancies and promotions among SNTE militants were exposed. As in, the selection processes ended up offering fewer teaching positions than they initially announced (Navarro Gallegos 2009, 8–9). In terms of education reforms, this administration set up two education reforms in 2011 and 2012. The reform outlined that public education would have “human rights” and “human dignity” focus with the students at the center (Senado de la República 2011). A second component made upper-secondary education compulsory and therefore its provision guaranteed by the state (Poder Ejecutivo, Secretaría de Gobierno 2012).<sup>46</sup>

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<sup>45</sup> The SNTE-SEP said to enhance conditions for competitive and efficiency at the magistry. Regarding the media and political devaluation of the Escuelas Normales and education professionals, Gordillo said that they “they produced of unemployed people [...] Is not fair that the government has to pay to support teacher schools for them to be unemployable (Navarro Gallegos 2009, 6; Valdez and Maldonado 2008)

<sup>46</sup> Unlike the PRI and MORENA administrations to follow, the timing of the PAN education reform happened at the end of term. In other words, it placed the Alliance for Quality of Education between SEP-SNTE as the normative guide since 2008,

To summarize, during this administration the education programs and policies were at times contradictory, poorly defined in terms of the problematic addressed within the education system, implementation timelines and responsibility sharing for evaluation (Instituto Nacional para la Evaluación de la Educación (INEE) 2016; Bocking 2020; Vera 2012). “The policy processes were not lineal, nor developed by clear stages” (Flores-Crespo 2011, 696). In addition, this administration failed in its attempt for more inclusive and democratic practices for education governance as it operated essentially in a co-direction between the federal government and SNTE, and not a fruitful one (Villa Aguilera 2011; Ornelas 2008; Loyo 2008; Aboites 2012).

#### *PRI administration (2012-2018)*

The PRI administration of Enrique Peña Nieto re-gained the presidential office in a highly contested electoral cycle in 2012, primarily against the left-wing party PRD with Andrés Manuel López Obrador again in the presidential ballot. During the electoral campaign, the PRI made clear that it would make a “real commitment with Mexico,” and that it was in fact a “new” and “modern” version of the PRI, one that had experience with policy institutions, and knew how to govern. The campaign spots and documents produced by the party aimed to send the message that the project for a new federal government with Peña Nieto would bring Mexico up to speed with global competitive standards required by open markets, foster better socioeconomic conditions through economic development while correcting the

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even when not incorporated legally nor programmatically in the formal institutions such as the constitution, although there were 12 text wording changes to the General Law of Education (LGE) between 2007 and 2012 (Instituto Nacional para la Evaluación de la Educación (INEE) 2016). The budget, institutional and normative from it were passed to the new federal administration.

governance shortfalls from the PAN administrations, portraying them as an “unsuccessful political experiment.”<sup>47</sup>

Specific to education, the programmatic agenda was profoundly aligned with the global education regimes as evidenced by the constant use of terms such as “efficiency”, “competencies for the citizens”, “global skills”, and “modern and quality oriented” education (Presidencia de la República 2013; Partido Revolucionario Institucional 2012; Secretaría de Educación Pública 2013; Presidencia de la República EPN 2013a). However, instead of guiding policy by UNESCO as the main source of international technocratic expertise as the two previous PAN administrations, the PRI fostered deeper ties with the OECD.<sup>48</sup> In addition to education, this partnership was part of the broader national agenda of structural change deriving in a total of eleven reforms including telecommunications, energy, taxation, finances, employment, and transparency; all to be implemented in the first twenty months of the new government (Ibarra-Yunez 2014; Presidencia de la República EPN 2014).

Added to this, there was an informal negotiation for the “Pacto por México” in which the three main parties in congress PRI, PAN, and PRD agreed on and fast-tracked with their party legislators the package of reforms proposed by the administration development plan (Nieto and Tepperman 2014; Mayer-Serra 2017; Arrieta Ceniceros and Ramírez Arriaga

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<sup>47</sup> At the time of the 2012 electoral cycle, the PAN administration was facing harsh criticism for its economic performance, combined with escalation of violence derived from the federal strategic “war against drug cartels” that left an estimate of more than 40,000 people dead between 2006 and 2012 and the proliferation of criminal groups across the country (Oyarvide 2011; Bataillon 2016; Gerardo Reyes Guzmán, Paola Hernández Victoria, and Carlos Moslares García 2015; Israel Cervantes Porrúa 2017)

<sup>48</sup> The relationship between the OECD General Secretary, the Mexican and long PRI militant José Angel Gurría and President Peña Nieto was regarded as a close one during all the administration, with regular and advertised meetings (La Información 2012; Presidencia de la República EPN 2018). Francisco José Gurría, José Angel Gurría’s brother was even appointed in the presidential cabinet of Peña Nieto within the Secretary of Agriculture and Rural Development (Redacción AN 2013)

2016). I define this negotiation as informal not necessarily because it was made in secrecy, it was in fact publicly announced and publicized in press releases, wide media coverage and even a signing ceremony in the Chapultepec Castle in México City on December 2<sup>nd</sup> 2012 (EPN 2013; Mayer-Serra 2017; El Economista 2012). It is informal because it represented a policy agreement negotiated during a private dinner among elite politicians (some who were not even elected officials at the moment), and who settled the terms and concessions needed to make their party legislators approve the package of reforms.<sup>49</sup> The economic and social reforms agreed upon raised criticism for several reasons among political experts and within political parties. The pact was at odds with the historic programmatic values of the parties, particularly the standings of the PRD on labor and privatization of the national energy sectors.<sup>50</sup> Thus, the *Pacto por México* reduced the constitutional agency and parliamentary value of policy deliberation and negotiation at the legislative chambers.

Keeping up with neoliberal models of development, the narrative around the education reform was strongly oriented towards improving the efficiency of the public system and bringing Mexican education to global standards of economic competition by developing human capital through education. The message was: Mexico could not be a competitive global economy in the twenty first century without an efficient education system. In doing so, the administration casted aside national actors even within the public national education institutions including the state Secretary of Public Education and the National Institute of

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<sup>49</sup> Was conceived from the PRI with the main figures of transition team, Luis Videgaray and Miguel Ángel Osorio Chong; the PRD leader Jesús Zambrano and former party president Jesús Ortega; and the PAN party president as well as the former secretary of government Santiago Creel (López 2020)

<sup>50</sup> The PRD stepped back from the pact by October 2013 due to incompatibilities in terms of energetic policy and privatization, not without causing internal fraction in the party which led to some dissidents to follow Andrés Manuel López Obrador to the MORENA party (Beauregard 2013; Martínez Gil 2014)



Evaluation for Education. The OECD took the role of the central advisor guiding the 2013 education reform, providing reputational value and legitimacy as a prestigious external party to lead the national modernization.

The moment Peña Nieto was named elected president, his transition team started having more regular meetings with technocrats and specialists from the OECD than with the functionaries operating at the bureaucratic institutions (Santiago et al. 2012; Bocking 2020). It was evidenced early on that the administration of Enrique Peña Nieto intended to break with the old political alliances in education governance and create new ones. The administration publicly ruptured with the SNTE and Elba Esther Gordillo by opening an investigation and later prosecuting her on charges of corruption, illicit enrichment, and organized crime (Castillo 2013; Tuckman 2011; BBC 2013; El País 2013; Prados 2013; Associated Press 2013). This highly publicized political move put in evidence corruption practices within the SNTE and teacher unions that had been perceived as pervasive by the general population for decades (Cárdenas Denham 2012; Glaser 2016; Marván Laborde et al. 2015; Amparo Casar 2015, 26). However, the timing of the investigation and later arrest of the union leader served the federal strategic narrative that teacher unions and education professionals were the one and only cause for education stagnation in the country, removing the responsibility of the state in the pervasive inequalities and malpractices across different levels of education governance for decades. Leaving teacher unions, state governments, academics, and education professionals out of the design of the new education reform also intended to help the federal administration regain control, publicity, and centralism.

The result was a highly controversial and unilaterally imposed education reform. The key points of the 2013 education reform can be summarized as modifications to the 3rd. constitutional article through the addition of three new secondary laws. They meant to establish the new lines for evaluation of the system, establishing a stronger mandate to the National Institute of Evaluation for Education (INEE); improving the professional teaching service with new criteria, terms and conditions for “Entry, Promotion, Recognition and Permanence in the Service”; and modifications to the General Law of Education to guarantee the provision of resources for schools (Presidencia de la República EPN 2013b; Granados 2018; Instituto Nacional para la Evaluación de la Educación (INEE) 2012; Gobierno de México 2014).

Within the new law for entering the Teaching Professional Service, there was a relatively less controversial component to allow open participation for teaching positions with an undergrad degree in the subject areas to be taught as a requirement.<sup>51</sup> However, the second component of the law related to the evaluation of existing professors explicitly altered the employment conditions of millions of teachers in the public education system across the country. It reinforced performance based metrics for retention and promotion, including the application of standardized tests to professors to determine their professional capacities, neglecting their context and environmental limitations (López Aguilar 2013; Prados 2012; F. Reimers 2018; Flores Andrade 2014). The reform raised contestation from both teachers’ unions and education professionals. Their main argument was their exclusion from the

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<sup>51</sup> A great example were the recruitment campaigns extended to people without teaching nor foreign language education experience but with proficient levels of English written and oral communication. As part of the national strategy for English learning “*México en Inglés: Programa Nacional de Inglés (PRONI)*” / “Mexico in English: National English Program”; aimed to strengthen English as a second language in primary and secondary public schools and contribute to a generation of more skilled, globally active students (Secretaría de Educación Pública 2017b; 2016)

discussion table and the mistrust on the new evaluation procedures for teachers, as they had a direct impact on their working conditions.

The 2013 education reform sparked protest, strikes, mobilizations, and at times violent confrontations between teacher unions and state forces for extended periods (Agren 2018; Bocking 2018; The Economist 2013; Echenique Vázquez, and Muñoz Armenta 2013). The protests and escalation of violence were particularly intense in the southern states where the *Comisión Nacional de Trabajadores de la Educación* CNTE had a stronger hold of militants.<sup>52</sup> Despite the mobilization of thousands of teachers and continuous strikes, the federal government defended the 2013 education reform as a necessary measure to take away the power of teacher unions altogether, making teachers more accountable through professional evaluation and the promotion of competitive skills in the curriculum (Secretaría de Educación Pública 2017a; 2013; Presidencia de la República 2013; Nuño Mayer 2018).

The PRI presidential victory was far more independent from teacher union alliances than its predecessors both during the one-party rule and the PAN administrations between 2000-2012. Since the PRI won the 2012 election without compromising policy concessions in exchange for electoral support from the teacher unions, it was able to alter education policy free from their influence. However, the approval of an education reform within a divided congress forced the administration to take part in informal policy negotiations and

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<sup>52</sup> CNTE emerged as an internal dissident movement of SNTE in 1979, as a consequence of leadership splitting and the claims for a more democratic representation within the union (Cook 1996). Over the next decades however, the CNTE itself, became increasingly corrupt. Although its rhetoric remained pro-democratic, and many of its state branches explicitly supported the Party of the Democratic Revolution (PRD), the “CNTE leadership also used its power to leverage benefits for its members with little consideration for broader social reform” (Glaser 2016, 45–46; León 2016)

concessions with the political elites (Arrieta Ceniceros and Ramírez Arriaga 2016). The strategy allowed the conditions for a legislatively successful educational reform (Muñoz Armenta and Castro Maravilla 2019). Nonetheless, the success of its implementation was tested due to the limited capacity of the federal government to contain the CNTE and teacher protests across the country. This shows that in an environment of weak policy institutions and informal shared governance; power to implement policy remains distributed among multiple players that do not have capacity to overpower the rest.

### *MORENA administration 2018*

The 2018 electoral campaign of MORENA with Andrés Manuel López at the front promised to dismantle the political status quo and break with the neoliberal regimes that preceded, address corruption, eliminate favoritisms, and promote a more efficient use of public resources and social programs without increasing taxation (Talanquer 2020; MORENA 2018; Barragán 2018; Perrigo 2018; Castro Cornejo 2022b; Phillips 2018).<sup>53</sup> The MORENA victory had the largest share of votes for a presidential candidate since the PRI was voted out of the presidency in 2000. It was also the first time a leftist government reached the presidential office and with a legislative majority (Instituto Nacional Electoral 2018; 2019). According to Castro Cornejo, “the success of the political left in Mexico is not rooted on voters’ programmatic preferences [...] but the loathing between parties and [...] rejection of the political establishment in Mexico (2022,1).

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<sup>53</sup> The MORENA candidate during and after elections sustained that additional taxation would be not needed, as in the budget challenge was not the absence of it but the way it was distributed and constrained by corrupt practices. That is to say, the message was that the country public finances were solid enough, but the problem on being distribution under low accountability of public institutions and widespread corruption among politicians at all levels taking turns to pillage the state for personal influence and sustain clientelist networks from the national budget (Barragán 2018)

Specific to education, both the PAN and PRI administrations previously analyzed in this thesis did prompt a central need for education reforms within their discourse. However, their programmatic plans were mostly limited to an extension and alterations of the constitutional setting to address challenges related to the system efficiency and education coverage. However, the language used by both López Obrador and the MORENA legislator's during the 2018 electoral campaign and in the office employed the explicit term of “cancellation” of the “badly called education reform” (AMLO 2018; Backhoff Escudero 2018; Presidencia de la República AMLO 2019a). Thus, it clearly expressed in its discourse a total rupture with the past of corruption and undemocratic dynamics over education governance. It emphasized that the 2013 reform was imposed by “out of touch” neoliberal Mexican political elites and international organizations (Diputados Morena LXV Legislatura 2019; Presidencia de la República AMLO 2019a; Presidencia de la República 2019a; 2019c)

During the 2018 electoral campaign, the party platform, debates and press releases stated a return to a nationalistic sense of education rooted in the national historic values, free of influence from international organizations and agencies (MORENA 2018; Juarez 2017; Lopez Ponce 2018). It committed itself to giving back the education to teachers, education practitioners, and parents. Furthermore, it committed to guarantee their rightful place in the decision-making process through conciliation and dialogue, placing them as the backbone of the national education system (Backhoff Escudero 2018; Juarez 2017; El Financiero 2018). From a political standpoint, the promise of a reversal for the 2013 education reform was mostly motivated by a desire to re-unify support for teachers' unions in general and the CNTE in particular. MORENA committed itself during presidential debates and campaign tours that a new education reform would be the first action of the administration once in office.

Moreover, it pledged to remove the most contentious aspects of the 2013 education reform: teacher professional evaluations (Juarez 2017; Lopez Ponce 2018; Bocking 2020; Monroy and Velázquez 2018).

The new education reform was published on Sept 30<sup>th</sup> 2019 modifying the constitutional sections of the 3<sup>rd</sup> constitutional article as well as the general law of education (Presidencia de la República AMLO 2019b; Presidencia de la República 2019b). Still, the new text did not remove the component of teacher evaluation completely, but rather emphasized a “selection process in equality of conditions” (Presidencia de la República AMLO 2019b). It essentially left the responsibility of defining teaching profiles to the set of complementary rules and procedures that would be define later. The administration created the General Law for the Career System of Teachers, but the law itself does not precise nor does it establish the specifics to guarantee the “equality of conditions” in the selection processes.

Second, it removed (or rather renamed) the National Institute of National Evaluation INEE, a decentralized organism created in 2002 during the PAN administration. The institute was first created based on recommendations from UNESCO to improve evaluation and produce more reliable information systems. In practice however, the INEE was relegated to a supporting research branch for the Secretary of National Education SEP during the PAN administrations since policy decisions were mainly co-managed between SEP and the SNTE. The 2013 constitutional reform did give the INEE a legal autonomous character as part of the OECD set of education policy recommendations, but not real changes were made to its mandate. Finally, the 2019 reform transformed the INEE to a National Commission for Continuing Improvement of Education (ADN Político 2019), with a para-state structure and

the central mandate to be on the side of teachers, support them with professional development and producing information “contributing to the development of the national education system” (Presidencia de la República AMLO 2019b; Villalaz Pacheco, Moreno Bayardo, and Ramírez Días 2020).

The third most important point of the reform was that it added the level of tertiary as compulsory, and therefore gave to the Mexican state the responsibility to provide it “with an sexennial goal of 100% of coverage by the end of the MORENA term in 2024” (Presidencia de la República AMLO 2019b; Castellanos-Ramírez and Carrasco 2022). However, the extension of the compulsory level has faced serious implementation challenges so far. Since the MORENA administration has committed to fiscal austerity, there are generalized concerns about the expansion of the tertiary level including the quality of the curricula, funding for the new facilities and the overall spending required to train teachers. Furthermore, the federal government has “delegated” the implementation for this compulsory expansion to the discretion of state governments. The reform established that the federal government responsible only for the funding and management of the “Universidades para el Bienestar Benito Juárez”.<sup>54</sup>

The education program of the MORENA administration included the creation of one hundred new public universities across the country, “Universidades para el Bienestar Benito Juárez” as well as an ampliation of the national scholarship and cash transfer programs. Even when

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<sup>54</sup> Universities for the Wellbeing Benito Juárez. Their goal is to provide free education services in localities with high and very high economic hardships, for young students that have not additional possibilities to access the existing institutions. They do not require entrance test and provide a monthly scholarship with a coverage goal of 300,000 by the end of the administration (Secretaría de Educación Pública 2019).

in paper might seem like a logic strategy to address social equity in a country with high levels of poverty and inequality, both strategies fall within the category of “easy redistribution” strategies. This administration put the creation of more schools and cash transfer programs at the center to foster electoral support, leaving a more profound transformation of the education system as pending and aspirational for future administrations.

Currently, the political and electoral conditions under which the MORENA administration gain the presidential office and congress majority have changed. Since its historic victory in 2018, the party has lost the majority in the chamber of deputies. In addition, both the party and president's approval rates have decreased after ongoing disclosures of corruption of high-profile cases within the party, nominations of candidates accused of sexual misconduct for state and legislative offices, and an overall mixed record denoting the incapacity of this administration to implement the promised transformation. Even with its strong initial support, this administration's has also shown inability or unwillingness to address institutional deficiencies, “missing the opportunity to strengthen the state and lay the ground for progressive social change” (Talanquer 2020, 401). So far, the only educational commitment “successfully” achieved has been the removal of the 2013 education reform and the implementation of a new one, but the success is limited to the legislative level. Even when the cancellation of the 2013 education reform was made early on into the administration, the MORENA programmatic plan did not seem to have a broader strategy beyond the reversal to replace it. Added to that, the timing of the new reform at the end of 2019 and the COVID19 global pandemic in March 2020 generated confusion regarding procedures, strategies, resources, and coordination between education actors and government levels. Consequently, the education system was severely paralyzed during the pandemic years. Mexico was one of



the last countries in the world to reopen classrooms until 2022, and the impact on learning outcomes and desertion rates during those two years is yet to be determined (INEGI 2021b).

## **5. Conclusions**

This thesis concludes that weak policy institutions in Mexico limit the potential positive effects of democracy over education when the electoral competition for federal office is high. First, education as a policy item is deeply tied to the federal government and the incoming presidential agenda is eager to rapidly alter education policy for developmental and/or political reputation. Second, the federal government shares and negotiates education governance informally with different elite actors. The phenomenon of informal negotiations for policy implementation are common in all political systems to an extent, and by themselves are not problematic. The true problem arises when informal policy negotiations as a common practice becomes the rule, as it ends up excluding the citizens from decisions over the education system. Citizens are limited to engage in education policy when voting for a preferred programmatic agenda, but the prevalence of informal agreements at the elite level diminishes the value of the exercise and the trust in the programmatic content. Given that 90% of the students in the country attend public schools, policy institutions should be concern with more accessible, accountable, and transparent mechanisms for citizen and education professionals' participation in education governance.

Interestingly, this thesis found that even when it seems as if Mexican education policy changes dramatically often as every new president wipes the board through a new education reform, these ongoing reforms are not as disruptive as anticipated. The proposed changes are more drastic in the discourse level than in paper. Education programs and policies in Mexico

are framed by the entering administrations as extremely ambitious efforts that will fix the education system. However, the programs, policies and laws remain relatively stable across administrations. The biggest changes for education policy associated with new incoming administrations are the informal alliances that share education policy governance, facilitated by weak policy institutions in place, as well as the gradual expansion of compulsory levels of education. To expand on this idea, this research has found that even when education remains centralized to the federal government, the federal administrations do not have the power to subdue the other informal actors in the system. The actors and informal alliances might change every administration because of heightened federal electoral competition but since Mexico has one of the largest and most stable education bureaucracies in the region, the alternation of parties and informal alliances do not disrupt the education system.<sup>55</sup>

The administrations under analysis share as a commonality phrasing the discourse on education as the key programmatic item to secure national transformation and improve social conditions, either to legitimize themselves or their parties. Every administration under analysis in this research, both during elections and when in office, highlighted the imperative of an education reform that would fix the public system and by consequence, solve the rest of the national problems. Thus, education policy is set off to underperform as it is born under unrealistic expectations. The striking differences between the three administrations under analysis are first, the discourse that they employ to frame education for electoral appeal and in their programmatic documents. Second, elite governance actors establish alliances with to fast track them and gain legitimacy. For the PAN administration, the discourse centered

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<sup>55</sup> The Secretary of Public Education was formally created in creation of the secretary of public education in 1921.

education as a component for democracy consolidation and human rights but did so by engaging in a non-democratic co-shared governance with the SNTE. The PRI discourse aligned education to global competitiveness, modernization, and global skills to foster human capital. Even when the PRI administration did not engage in sharing education governance with teacher unions, it had to secure informal policy alliances with political party elites and the OECD to support a broader economic reform package. Finally, MORENA entered the presidential office with congressional majority, so it was also able to design education policy relatively free from engaging in party alliances. However, it deeply aligned the education program with the grievances against unilateral imposed policies and international institutions interference in policy design since the electoral cycle. This discourse managed to harvest support from the CNTE, assuring that the administration would “give back the system to the teachers” and “bring back the national and humanistic values” taken away by old political and neoliberal elites.

This thesis also found that education as a policy item in Mexico is extremely vulnerable to be instrumentalized as a window dressing and aspirational policy; but a relatively safe one to alter among the other policy sectors. The parties that have exited the presidential office have done so with a mixed record of their education policies and programs, but education still ranks lower than other concerns for citizens compared to corruption, security, and economic performance. Thus, education as a policy item is unlikely to demand greater accountability from the federal performance. There are mediatic reforms, constant pronouncements about spending on infrastructure, continuing cash transfer programs, and the “easy redistribution” strategies. Easy redistribution strategies can be cash out sooner by policymakers for electoral support, but more transformation intensive measures will remain politically sensitive and

unlikely to be altered profoundly. The use of education as the default aspirational window-dressing policy limits the upgrading effects on education that tends to be associated with democratization and electoral competition.

There has been notorious progress in the past twenty years regarding the curricular content to incorporate new skills, updates on compulsory levels of attainment, and resource provision for the system. But the federal administrations reliance on alliances for co-shared governance with potential detractors/supporters, leave education policy subordinated to the multiplicity of actors at play and the education discourse in turn. For the Mexican case, the dynamics between elite actor rotations at the federal level derived from high electoral competition limits the upward transformation of the education system, so by itself, democracy does not improve education, nor does it make education governance more democratic by allowing policy access to different sectors of society. Finally, this work concludes that as long as social and economic inequality remains high and unaddressed in the country, the alignment of common interests and demands among different groups for specific policies such as education will be complex, but this thesis will leave this as a pending research for the future endeavors as it falls beyond the scope of this research.

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