

Why Do Governments Adopt Neoliberal Education Policies? Critical Theory on Policy Movement in the Context of Contemporary Reform in Mexico

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ABSTRACT: Both the fields of critical human geography and comparative education have developed substantial thinking on the spread of neoliberal public policy across national and subnational boundaries. Key means for explaining policy transfer include external advocacy from powerful transnational authorities such as the World Bank and the OECD, ideological influence in the form of think tanks, and domestic structural-institutional pressures in the form of the interests of national business elites. The relative strength of opposition groups such as teachers' unions and pro-public education organizations is a significant counterbalancing factor. In this paper I investigate the relative weight of each factor behind education policy development in the context of Mexico's contemporary adoption of neoliberal 'education quality' reform. I focus on the so-called 'Alliance for Quality Education' enacted in 2008 under the 2006-2012 Calderon administration, subsequently amended into the constitution under the 2012-2016 government of Enrique Peña Nieto. These measures include among others, the tying of teacher salary and job security to an expanded regime of student standardized testing, and increased private sector involvement in the public provision and financing of education from kindergarten to secondary level education. The neoliberalization of public education has advanced significantly in Mexico, especially due to the advocacy of Mexican business lobbyists facilitated by ideologically predisposed state officials. However due to a conjuncture of factors, their success is threatened by a consolidating pro-public education teachers' movement.

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Critical human geography and comparative education have developed substantial thinking on the means through which neoliberal public policy spreads across national and subnational boundaries. Key means for explaining policy transfer include external advocacy from powerful transnational authorities such as the World Bank and Organization for Cooperation and Development (OECD), ideological influence in the form of think tanks and powerful lobby groups, and domestic structural-institutional pressures, in the form of both the interests of national elites as well as the relative strength of opposition groups such as teachers' unions and pro-public education organizations. In this paper, I investigate the relative weight of each factor behind education policy development in the context of Mexico's contemporary adoption of neoliberal 'education quality' reform. I focus on the so-called 'Alliance for Quality Education' (ACE) regulations enacted in 2008 under the 2006-2012 Calderon administration, subsequently amended into the education statutes of the national constitution under the subsequent government of Enrique Peña Nieto in December 2012 and enshrined through legislation in September 2013. These measures include the tying of teacher salary and job security to an expanded regime of student standardized testing, and increased private sector involvement in the public provision of education from kindergarten to secondary level education. These practices strongly resemble both policies advocated by the latest World Bank and OECD education strategy papers (*Making Schools Work*, 2011; *Getting it Right*, 2012) and the demands of domestic corporate education lobby groups like Mexicanos Primero.

I argue that the prominent role of the World Bank and the OECD in articulating education policy adopted by the Mexican government rests significantly on a convergence with the agenda of Mexico's powerful domestic business lobby, which is interested in privatizing public education. The importance of these external groups is principally to offer a technocratic form of legitimation, above the partisanship of Mexican electoral politics and interest groups. The close ties of the current secretary-general of the OECD, José Ángel Gurría, with the administration of Peña Nieto is an additional, more coincidental factor which elevates the OECD to greater prominence than it would otherwise likely have in influencing Mexico's education policy. However the rollout of the agenda of these powerful domestic and external elite forces has been uneven because of Mexico's

democratic teachers' movement, which has gained strength as the official state-aligned leadership of the teachers' union has weakened.

This empirical study brings together theories on neoliberal policy movement from critical geography, especially Peck (2002, 2011), Harvey (2007) and Prince (2012) and the 'Globally Structured Agenda for Education' (GSAE) approach within comparative education, influenced by Steiner-Khamsi (2000, 2012), Verger (2009), Carnoy (1999), Klees (2008) and Dale (2000), to consider the actors in neoliberal education reform and the relative importance of their roles in the context of Mexico. Having identified "the agents of transfer" (Steiner-Khamsi, 2000, 164), I will study the extent to which 'borrowing' states actually implement foreign policy, and how this process reinforces or undermines political movements for neoliberal education reform in Mexico.²

COMPARATIVE EDUCATION AND CRITICAL GEOGRAPHY: THEORIES OF POLICY MOBILITY

I begin with the argument that critical perspectives from geography on policy transfer are highly complementary with those of comparative education for understanding why and how neoliberal education policies cross national borders. Steiner-Khamsi notes how despite the broader, 'trans-sectoral' focus of the policy studies field of research, it supports a welcome depth to the approaches of comparative education. This approach can more specifically be identified as the GSAE approach, with its emphasis on situating local or national policy developments within political and economic changes at the global scale (Steiner-Khamsi 2012, 4). She explains how these two fields of research complement each other with:

"...a similar interpretive framework and method of inquiry, that enables them to draw attention to the local meaning, adaptation, and recontextualisation of reforms that had been transferred or imported. They have systematically adopted a lens that lends explanatory power to local policy contexts, and makes it feasible to explore the contextual reasons for why reforms, best practices, or international standards, were adopted. For these authors, reforms from elsewhere are not necessarily borrowed for rational reasons, but for political or economic ones." (Steiner-Khamsi, 2012, 4)

² Much of the research and writing of this paper was done while I was living in Mexico City in July and November of 2013. During the latter visit, I represented my teachers' union, the Ontario Secondary School Teachers Federation (OSSTF) at an international conference in solidarity with the Mexican teachers' movement, facilitating much of the access to movement activists and journalists which informs my analysis.

Prince (2012) positions critical geographers as sharing a similar analysis to what Steiner-Khamsi would likely describe as the GSAE approach, emphasizing the importance of studying political and economic causalities within their historical and geographical contexts. More concretely, this means situating the study of policy transfer within an understanding of neoliberalism as a globally dominant political-economic ideology that consistently seeks the expansion of markets into public education. In doing so, he supports the broad methodological analysis developed by fellow geographers Harvey (2007, 115-116) and Peck (2011, 387-388).

Critical geography contributes an articulated analysis that is perhaps more explicit than the GSAE literature of how neoliberalism's globally prevalent ideology is highly uneven in its spatial implementation. As will be discussed below, negotiations and conflicts between domestic and elite groups, and especially the opposition of teachers' movements, are important reasons for this disconnect between policy and reality. Recent works in critical geographies of education also emphasize how practices within school systems can have a strong association with political dynamics at the urban scale (Thiem-Hanson, 2009), such as Lipman's study (2011) concerning the use of charter schools to aid the gentrification of South Chicago.³ Here, I primarily consider policy transfer and political contestation at the national-international scale, which contains many similarities with the GSAE work that is rooted in country-level development studies. Mexico's education system is highly centralized, with key decisions made by the Secretary of Public Education in Mexico City. The official teachers' union, the Sindicato Nacional de Trabajadores de la Educación (SNTE), is tightly controlled by its national executive. During the period examined here from 2008 to 2014, Mexico's teachers were able to mount an opposition movement that spanned the country. However, an awareness of uneven resistance and divergent institutional contexts at the subnational level is critical to understanding why many state governments were compelled to reach compromises with the movement, despite the abstinence of the federal government.

Like Steiner-Khamsi (2012) and Dale (2010), Prince (2012) defines the approach of critical geographers engaging in policy mobilities research against approaches conventionally taken, principally policy convergence as the inevitable result of cultural and social globalization and the up-take

³ Other recent urban-focused examples include Seattle (Lizotte 2013), New Orleans (Huff 2013) and Toronto (Basu 2013). Few similar studies exist for Mexico, however my forthcoming dissertation will study the construction of teachers' resistance to neoliberal policy in Mexico City, among other North American cities.

by governments of ‘best practices’ from abroad. Within education policy studies, this line of argument is most clearly identified with the Common World Educational Culture approach, primarily identified with the work of John Meyer (see Dale 2000, 455). This approach has been criticized by Steiner-Khamsi (2012, 4) as being “naive” for not considering the contingencies of power struggles at various political scales relevant to education policymaking.⁴ While broadly sharing her critique of ‘consensus-based’ policy convergence (Steiner-Khamsi 2000, 158), Prince (2012, 189) positions that analysis as principally the product of mainstream policy studies, arguing:

“But geographers have had a different focus, studying policy transfer in order to think about how they manifest the changing power relations which shape the circumstances in which they occur. This work speaks to the interscalar and cross-national power struggles that produce the policy harmonization and differentiation that together constitute internationalizing policy regimes.”

Peck (2011, 775) makes a similar distinction utilizing categories to distinguish between positivist best practices ‘policy-transfer’ anchored in political science, and a social constructivist ‘policy mobilities’ that is trans-disciplinary and contextual. Finding complementary analyses between critical geographers engaged in research on policy transfer and the GSAE approach within comparative education, I will now discuss the political and economic causalities behind the latest wave of neoliberal education policies in Mexico.

CONSTITUTIONAL AMENDMENTS: THE CONTEMPORARY ROLL-OUT OF NEOLIBERAL EDUCATION POLICY

The package of neoliberal education reforms at the centre of this study were introduced to the Mexican Congress by Enrique Peña Nieto on December 10, 2012 less than two weeks after his presidential inauguration on December 1. In an instance of what Peck has described as ‘fast policy’ (2010, 195), the swiftness by which Mexico’s lower and upper

⁴ Dale (2000, 436) draws a key distinction between the Common World Educational Culture (CWEC) approach and GSAE, with the former emphasizing ‘idealistic’ causality, and the latter using a structural-materialist lens, “For CWEC, the world polity is a reflection of the Western cultural account, based around a particular set of values that penetrate every region of modern life. For GSAE, globalization is a set of political-economic arrangements for the organization of the global economy, driven by the need to maintain the capitalist system rather than by any set of values.”

legislatures passed this legislation on December 21 and became law on February 6, 2013 was remarkable.⁵ Seemingly intent on distinguishing himself from his two predecessors, whose legislative agendas were largely blocked over each of their six-year terms, as well as shaking off considerable political attacks during the election campaign and allegations of massive vote fraud, Peña Nieto moved fast and effectively to build a political consensus with his two principal rival parties. The 'Pact for Mexico', co-signed with the leaders of the conservative National Action Party (PAN) and the centre-left Party of the Democratic Revolution (PRD) (in the latter case provoking substantial internal dissension), was unveiled on Peña Nieto's second day in office. The accord comprised a series of major proposed bills, of which primary-secondary education reform was only the first. Others included changes to labour statutes in the constitution that legalized already prevalent precarious employment practices, reforms to the tax code and the denationalization of Mexico's energy sector. The ease by which these major changes passed in Peña Nieto's first year in office, with the endorsement of all three dominant parties (though with the PRD opposing energy liberalization and leaving the Pact for Mexico on this basis) is virtually unprecedented since the fading of the Institutional Revolutionary Party's (PRI) seventy year rule over Mexico as a one-party state in the 1990s.⁶ This elite ideological consensus behind the roll-out of neoliberal policy provides much of the basis by which profound changes to Mexico's education system were enacted (Hernández Navarro, 2013, 27-28).

Key contents of the reforms centered around teacher hiring, salaries and job security, many of which were in fact previously established in the 2008 'Alliance for Quality Education', negotiated between the prior president Felipe Calderon, and SNTE president Elba Esther Gordillo.

⁵ Peck defines 'fast policy' as emerging transnational networks of rapid policy exchanges between technocratic experts, typically claiming a pragmatic ambivalence to any political ideology. Their activities and policy conclusions tend to be insulated from direct public influence or oversight and in fact emerge from within defined, usually narrow ideological frameworks (Peck, 2010, 195-196).

⁶ The PRI and its predecessor parties ruled Mexico at the national level, and in nearly all states and municipalities, nearly all of the time, from the end of the armed period of the Mexican Revolution in the 1920s until 2000, when it lost what was arguably the second free election held during this period. The significance of the rapid enactment of significant neoliberal reforms through Peña Nieto's 'Pact for Mexico', is evident when contrasted to the previous three terms of PRI and PAN presidents. Beginning with PRIsta Ernesto Zedillo's election in 1994 (the first free election), emerging social movements and fiercely partisan opposition parties made the passing of sweeping policies difficult, defeating radical changes to public education. Shifts in the internal dynamics of the PAN and the PRD that led both to collaborate with Peña Nieto are beyond the scope of this paper, but the ideological convergence of the three parties and the clear resurgence of the PRI after twelve years out of national office are key factors.

However due to fierce resistance by long-standing opposition within the union, these reforms were wholly or partially unimplemented in several key southern and central states.⁷ By embedding these policies within the Mexican Constitution, with all the legal weight this implied and then implementing them through new legislation in a renewed effort to impose them nationally, Peña Nieto strived to overcome this resistance.

The legislation passed in February 2013 inserts new language under the education clauses of the Mexican Constitution (Article 3), stipulating that teacher hiring will be subject to the passing of standardized exams, and that the continuation of their employment will depend on success at subsequent evaluations over the course of their career. The implementation of these articles was defined by subsequent 'secondary laws' passed in September 2013 (Arriaga, 2013, 13-14). A series of standing proposals from the government were planned to determine teacher employment. The singular focus of these proposed policies lead many education activists to argue that the reforms really have very little to do with so-called education 'quality', and should properly be considered as labour market reforms targeting employees in the public education sector.⁸ New teachers would be hired on the basis of passing a professional exam, a policy advocated as a means of eliminating widespread nepotism in the form of teachers inheriting a position from a retiring parent, or otherwise bidding on an opening in exchange for the outgoing teacher's 'endorsement', a process also reputedly coordinated by corrupt union officers for personal enrichment. The reality was quite different in the southern states of Oaxaca and Chiapas, where the democratic teachers' movement union won control of union locals in the 1980s.

Here, teacher hiring as well as promotions to administrative and supervisory positions have been handled transparently, with the latter determined through elections by their peers, in a remarkable form of workers' self-management (Cook, 1996, 194-195). Nevertheless, with teacher hiring practices widely criticized by the public as corrupt due largely to sensational media exposés like the film *De Panzazo!* and the experiences of applicants in states controlled by union officials tied to Gordillo, provisions around union control of hiring were eliminated with little resistance. Another proposed change in hiring would remove the mandatory requirement of a minimum one-year university degree in education, reducing the qualification

⁷ Oaxaca, Chiapas, Guerrero, Michoacan, Morelos and Mexico City.

⁸ In Hernández Navarro's (2013, 16) words: "Their real goal is to change the nature of work for teachers."

for becoming a public school teacher to holding an undergraduate university degree and passing the exam (Hernández Navarro, 2013, 40).⁹ Under the ‘Alliance for Quality Education’ (ACE), salary and job tenure were largely removed from the stipulations of union negotiated collective agreements, with increases determined on a formula weighted 50 percent on the annual standardized exam results of their students (professional development accounts for 30 percent, ‘school leadership’ for 10 percent and seniority 10 percent). However as was mentioned above, teachers’ groups organized outside the official SNTE union defeated the implementation of the ACE in states across central-southern Mexico (Bocking, 2012, 14). Laws under consideration would revive this effort of replacing negotiated salary increases with merit pay driven by student and teacher testing.

ACE also included the creation the National Institute for Education Evaluation (INEE) as a branch of the Secretary of Public Education (SEP) to oversee teacher and student exams. The constitutional amendment makes the INEE autonomous office, directly overseen by the federal executive, ostensibly to provide it with both greater impartiality and to insulate it from the political contestation of the teachers’ union within the SEP. The constitutional change strengthens existing ACE policies, with failure on a test stipulating mandatory professional development training at the teachers’ expense at one of many newly opened privately-run training schools, with subsequent failure leading to dismissal (Arriaga, 2013, 13-14; Bacon, 2013).

An additional proposal is the trial roll-out of an extended school day from six to eight hours with some, but not proportional increased compensation for teachers. According to investigative journalist Hernández Navarro (2013), Peña Nieto preempted teacher opposition to this demand by “demagogically” portraying resistant teachers as unwilling to work hard to educate children. Finally, a touchstone of the proposed reforms emerging from the constitutional amendment is enhanced ‘school autonomy’. Promoted as a measure to increase parental participation in their children’s education, coupled with teacher exams, it would empower principals to directly hire and fire teachers, significantly weakening collective agreement provisions regarding employee

⁹ Even the latter could be negotiated, provided one held sufficiently strong reference letters from administrators, according to some anti-reform activists in the state of Morelos who had fought the original pre-Constitutional version of this hiring practice initiated in many states as part of the ‘Alliance for Quality Education’. In effect, coupled with a defacto deskilling, one form of patronage was replaced with another, favouring school authorities (Bocking, 2012, 14).

discipline. While the overwhelming focus of the reforms is on changing the employment conditions of teachers, the ‘school autonomy’ measures are also important because of its encouragement of individual schools to set student fees (previously widespread but legislated at the state level, despite violating the spirit of constitutionally guaranteed free access to primary and secondary education). Education critics fear the measure will encourage schools to enter into increased corporate partnerships to make up for chronic underfunding. Measures also provide for the increased provision of school-based and mobile internet-ready computer labs, with significant private funding.

Two weeks after the signing of the education reforms into the constitution, Mexican authorities arrested the president of the SNTE since 1989, Elba Esther Gordillo, and charged her with embezzling hundreds of millions of pesos in union funds (Tuckman, 2013). The democratic teachers’ movement joined the broad Mexican public in celebrating the fall of a power broker legendary for her personal corruption. The arrest of arguably the most powerful woman in Mexican politics was strategic both for the roll-out of the education reforms, and for setting the terms of Peña Nieto’s presidency:

“The unpopularity of Elba Esther Gordillo in public opinion is so great, that any action to change the system of teaching in the country that included the defeat of the lifetime leader of the SNTE, easily won broad popular support.... This announcement [of her arrest] and the intense publicity campaign that accompanied it, led to employer’s associations, academics and parts of the population giving their support to the new government.” (Hernández Navarro, 2013, 27)

I now turn to the political and economic implications of these policies, drawing attention to the intersections of external policy advocacy, cross border ideological movement and domestic institutional struggle.

WORLD BANK AND THE OECD: THE INFLUENCE OF TRANSNATIONAL ACTORS ON EDUCATION POLICY FORMATION

Aside from the ‘best practices policy learning’ models proposed by advocates of CWEC, and critiqued by researchers using the GSAE approach as lacking a nuanced contextual analysis of political and economic power relations, Verger (2009) proposes several key ‘mechanisms’ through which global institutions influence national education

policy: imposition, IMF attaches conditionalities related to the implementation of specific economic policies in return for loans; the dissemination of policy through recourse to technical expertise and the shaping of data, as in the case of the extensive research and policy papers produced by the WB and the OECD; and standardization, whereby states agree to adhere to an international norm such as the administering of the Program for International Student Assessment (PISA) exam (Verger, 2009, 382). Similarly, Carnoy (1999) associates these mechanisms with the roll-out of competition and finance-driven reforms, under varying degrees of compulsion by the World Bank and the IMF, and strongly held beliefs within the national state that such measures are critical for ensuring international competitiveness in the context of capitalist globalization. While advocates of the CWEC approach would agree with the significance of the latter two mechanisms, researchers applying a GSAE analysis argue that CWEC ignores the contextual political conflict in which these exchanges occur, which are important to understanding their role in the context of neoliberal education reform in Mexico.

The role of the IMF and its capacity for influencing state policy through loan conditionalities has declined in Mexico in the decades since the massive bailout following the Peso Crisis of 1994 (Sigmond, 2010). The WB and the OECD have a major presence in Mexico and a significant impact on the formation of national education policy. However, in my view, the mechanisms by which the WB and the OECD influence Mexican education through advocating policy reforms are best described as collaboration through dissemination and standardization, with the leading role played by Mexican authorities, rather than through involuntary imposition.

Klees describes the World Bank as “the major player in global education policy” and “at the forefront of the shift to neoliberal thinking” (Klees, 2008, 312). Mexico is the WB’s fourth largest ‘portfolio’, with loans reaching \$6.4 billion in 2010 and dropping to \$2.8 billion in 2011 (World Bank 2013).¹⁰ Of twenty-two active projects in 2010, five related to primary, secondary or tertiary sector education, including a \$1.5 billion supplement to the Mexican government’s Oportunidades program, which provides small cash transfers to impoverished families tied to completing tasks such as maintaining school attendance. \$220 million was also budgeted in a ‘School-Based Management’ project

¹⁰ Mexico’s GDP shrank by 6 percent in 2009, far worse than the average for Latin America and the Caribbean, which shrank by 1.5 percent, due to Mexico’s far greater economic reliance on the struggling US market for exports and as a source of remittances (World Bank, 2013).

intended to assist the roll-out of ACE, though at the submission of the 2010 annual report, no funds had been disbursed (World Bank, 2010). Certainly the World Bank's capacity to provide significant funding for projects it supports has an influence on the priorities of a national education system with pressing needs in numerous areas. In addition to its significant budget, the World Bank (like the OECD), can also clothe its recommendations in a veneer of objectivity, making highly political assertions difficult to contest:

"The various statistical tables, diagrams, spreadsheets, charts and other abstracting and universalizing technologies which enable comparisons and translations to be made with ease bring these objects, and the places that contain them, into a virtual space of comparison where policy learning, exchange and transfer can take place. The assembly of these technical systems across geographical space enables particular objects that draw on and refer to them... to travel relatively unproblematically from place to place." (Prince 2012: 193)

Mexico's constitutional reforms incorporating teacher evaluation and related legislation under deliberation do appear to strongly resemble those advocated by the WB in its Making Schools Work report, which is also primarily focused on changing teachers' employment conditions, rather than advocating for distinct pedagogical approaches or increased funding for schools.

As in the Bank's other recent major education policy document, Learning for All (2011), the language centers around increasing 'accountability,' 'quality' and 'effectiveness'. The WB's concept of 'school-based management' (SBM), mirrors the 'school autonomy' policies found in ACE and the proposals for the realization of Peña Nieto's constitutional amendments, giving principals the right to grant salary raises, discipline and fire teachers based on their performance on exams or that of their students. While not directly advocating school fees and confronting the basic principles of 'Education for All', like Mexican advocates of school autonomy, the Bank suggests additional benefits from SBM can be derived from more "resources from parents (whether in cash or in-kind)" and school committees with parental involvement engaged in fundraising (Burns, 2011, 88-90). Writing in 1999, Carnoy's critique of 'school autonomy' remains prescient. In terms of decentralizing decision-making, he argues that in practice, public school teachers in most countries (including Mexico) already enjoy substantial autonomy

in how they approach curriculum in their classrooms. Carnoy notes that 'autonomy' policies have been opposed on the grounds that they have tended to consist of downloading some funding responsibility from federal or state authorities to the municipal level, which usually has a more limited capacity for raising revenue, or to the parents of students themselves, as the WB itself implies (Carnoy, 1999, 52-56). Peck describes this downloading of public services like education since the 1990s as a widespread scalar strategy associated with neoliberalism intended to shift risks and responsibilities where possible to local and extra-state authorities which are increasingly encouraged to compete for globally mobile private investment (Peck, 2002, 391-394).

As described by Carnoy (1999) and Klees (2008), while deploying substantial language around improving student learning and despite various ancillary programs, the focus of the WB remains the limitation of state expenditures on public education, principally through reduced labour costs of teachers and privatization. *Making Schools Work* presents several case studies of experiments in African and South Asian countries of the impact on student achievement of replacing permanent teachers with contract employees paid a fraction of the standard salary, and sometimes without professional qualifications (Burns, 2011, 147-156). However, despite the Bank's undeniably strong presence in Mexico, it is difficult to impute the extent to which the WB directly influences policy of the Mexican government, beyond the implementation of specific projects such as the 'School-Based Management' program mentioned above.

However a complex and significant relationship can be assembled between the government of Enrique Peña Nieto and the OECD, especially in the persona of its secretary-general, José Ángel Gurría, who has deep connections to the president's Institutional Revolutionary Party (PRI). After joining the party at 18, as a "fanatic of the free market" according to Hernández Navarro (2013, 99), in the 1980s he sided with the ascendant neoliberal technocrats over the populist corporatist faction who had built the PRI from its origins in the 1920s. Gurría was Mexico's chief negotiator for NAFTA and later served as minister of foreign affairs and secretary of finance in the Zedillo government (1994-2000). A rising star within the PRI, he was considered a potential presidential candidate, prior to 12 years of PAN rule (Hernández Navarro, 2013, 99-101). First appointed to lead the OECD in 2006 with an endorsement by outgoing Mexican president Vicente Fox, Gurría maintained nominal relations with the government of Felipe Calderon of PAN. However he has only strengthened his ties to Peña Nieto from when the latter served as governor of

Mexico State prior to winning the presidency, playing an active role in the president-elect's preparation of policy up to his assumption of office, and afterwards frequently voicing his support publicly for initiatives like the Pact for Mexico and the education reforms (Brito, 2013).

In a CNN Español article titled "OECD reading the script to Peña Nieto", journalists reported on Gurría's initiative to speak out in September 2012 soon after the confirmation of Peña Nieto's victory on the urgent need for structural reforms. The president welcomed the comments, replying "I propose that the OECD become a strategic ally for the design of the policies that Mexico needs, and what greater contribution than to have a friend at the head of this organization." (Jiménez, 2012) For his part, Gurría responded graciously and with urgency that the OECD, "awaits its orders to work with Mexico, its institutions...day by day to make the Pact [for Mexico] a reality." (Hernández Navarro, 2013, 101). He adds in the forward to *Getting it Right: Strategic Reforms for Mexico*, a document released in September 2012 and explicitly intended to help shape the agenda of Peña Nieto's transition team prior to entering office in December, that "the new Mexican government should consider the OECD an extension of its own capacities." (OECD, 2013a, 4). During his inaugural visit with European heads of state in October 2012, the president-elect made time to include a personal visit to the OECD headquarters in Paris (Hernández Navarro, 2013, 114). One month earlier, Peña Nieto signed a "declaration of intentions" with the OECD to begin the privatization of the publicly owned oil company PEMEX. The action was seen as evidence of the OECD's influence, given that this was one of the key recommendations of *Getting it Right* (Villamil, 2012).¹¹

The education section of this document echoes the WB in encouraging the Mexican government's ongoing drive to increase use of standardized student and teacher evaluations as the surest means to improve education 'quality'. It also diagnoses a deficit of 'school autonomy', defined as the ability of principals to directly hire, set salaries and fire school staff (OECD, 2013a, 129-130). The consistency of the neoliberal orthodoxy in the OECD's recommendations and its fealty to 'finance driven reforms' as defined by Carnoy (1999, 42), is evident by their consistent dismissal of their own extensive survey data, which would reasonably suggest that 'teacher quality' in Mexico would be best improved by raising salaries and providing paid preparation time, rather than increasing workplace

¹¹ However it should also be noted that privatization of PEMEX has been a long standing and key demand of Mexican business groups, foreign investors and pro-free trade transnational agencies like the OECD as well as the World Trade Organization, IMF and WB.

discipline. The report cites a Secretary of Education survey of school principals indicating frequent lateness among staff, due to teachers working at different schools in the morning and afternoon. Improvements in teacher scheduling are not suggested, nor are low salaries acknowledged as the reason why many primary and secondary teachers seek an additional shift or ‘plaza’ (OECD, 2013a, 129, 132).

According to the OECD’s comprehensive survey of the education systems of member nations, *Education at a Glance 2013*, annual classroom instructional hours in 2011 for Mexican secondary teachers were 1050 hours (the OECD average is 709), the third highest in the OECD after Argentina, Chile and the US (OECD, 2013b, 396). Another strong indicator provided by this survey of the likely widespread high levels of stress experienced by Mexican teachers is that 100 percent of recognized work time for primary teachers and 90 percent for secondary teachers is spent on classroom instruction, by far the highest average in the OECD (OECD, 2013b, 399).¹² This means virtually no recognized, scheduled and compensated time is provided for Mexican teachers to mark, prepare lesson plans or attend meetings with other school staff or parents. All of the tasks described above are pushed into time unrecognized by education authorities (e.g. evenings and weekends), usually performed away from the worksite. However, rather than disbursing the additional funds required to free up additional teacher time enabling them to improve the ‘quality’ of education, the Mexican government, WB and OECD, in conjunction with business advocacy organizations, pursue a strategy of increasing the ‘quantity’ of teacher work, disciplined by increased employment precariousness.

The specific political conjuncture of the return of the PRI to national power and the leadership of one of its own at the head of the OECD has led this transnational agency to obtain significant influence over policy formation within Mexico. The context parallels the policy mobilities scenario outlined by Koenig-Archibugi (2010) and Verger (2009) in which outside experts are enlisted to validate the contested policies of factions of the state. Navarro clearly makes the connection to the close relationship between the Mexican government and the OECD:

“[Mexican] governments have systematically adopted the great majority of their recommendations. At key moments, this has supported

¹² In Canada by comparison, elementary and secondary school teachers respectively spend 65 and 60 percent of their recognized work time directly instructing students (OECD, 2013b, 399).

government policies that did not hold sufficient internal consensus, to be legitimized when presented as the advisories of the supranational organization. In this manner internal negotiating positions are strengthened.” (Hernández Navarro 108-109)

However if this has been the case at least since the affiliation of Mexico to the OECD in 1994 and participation in PISA since 2000, how has the close relationship between Peña Nieto’s government and Gurría manifested itself? Navarro explains the new closeness of this relationship:

“But if the influence of the organization [OECD] on defining education policies has been so significant for many years, what’s new about it now being decisive at the moment of setting these new education norms? The difference between the previous reforms to teaching and the recent changes to the Constitution is that these elevate to a higher level the OECD’s proposals, constitutionalizing them....preventing a regression on these reforms.” (Hernández Navarro, 2013, 103)

If it is evident that the WB and especially the OECD have provided critical support in laying the groundwork for the Mexican government’s contemporary neoliberal education reforms, another key form of cross border ideological movement has been the role of Mexican-based business lobby groups, which strongly resemble similar organizations in the US. While the WB and OECD supply policy rationales and authoritative research, the latter groups strive to open up political space for reforms within the broader Mexican public. By studying these organizations, especially the activities of Mexicanos Primero (Mexicans First), a clearer picture of the balance of elite structural-institutional pressures within Mexico in favour of neoliberal reforms becomes evident. Of course, this broader political-economic context remains a contested space, particularly in light of the democratic teachers’ movement in confronting and potentially transforming these policies.

MEXICANOS PRIMERO AND DOMESTIC STRUCTURAL-INSTITUTIONAL FACTORS BEHIND EDUCATION REFORM

Like the World Bank and the OECD, since its founding in 2005 Mexicanos Primero, has worked extensively to popularize the notion that “Only quality education will change Mexico” (Mexicanos, 2013) within policymaking circles and civil society at large. In doing so, it has represented the consortium of corporate interests which comprise its

directorship and funding sources, emerging as perhaps the most important Mexican business lobby group on education. Its founder, Claudio X. González Guajardo was previously the president of Fundación Televisa, the corporate social responsibility arm of the Televisa conglomerate, Mexico's massive private TV and radio monopoly. He is also the honorary president of the Unión de Empresarios para la Tecnología en la Educación (Union of Businesspeople for Technology in Education, UNETE), a corporate lobby group for obtaining technology contracts in Mexican public schools. UNETE funders include Intel, Microsoft, Toshiba and Ford (a major private funder of Mexican schools). Guajardo's father is multi-billionaire Claudio X. González Laporte, president of Kimberly Clark Mexico, chair of the Mexican Businessmen's Association, and one of the most powerful business leaders in Mexico (Bacon, 2013b; Hernández Navarro, 2013b; Economist, 2008).

Mexicanos Primero rose to significant power with the victory of Peña Nieto, however the group first emerged to prominence with the release of their film, *De Panzazo!* in 2011. The documentary has been frequently described by critics and supporters alike as a Mexican version of the earlier released and US-focused *Waiting for Superman*. In both films, education reform advocates decry the failings of their respective national education systems, especially for the most marginalized students, present the power of teacher unions as a principal cause through its alleged role in protecting bad teachers and opposing reforms, and position neoliberal policies as the solution (Zebadúa, 2012; Bacon, 2013b). How can we account for the strong parallels between messaging of *Mexicanos Primero* and similar groups in the US behind *Waiting for Superman*, like *Students First*, founded after the Mexican organization in 2010 by Michelle Rhee? David Bacon (2013) quotes the founder and former rector of the Autonomous University of Mexico City, Manuel Pérez Rocha, on the parallels between corporate-led strategies in the US and Mexico: "The Mexican right always copies the United State's right... The politics of merit pay and the correlation with standardized exam results is identical between the two countries. The right wants to convert education into a commodity and students into merchandise – 'Let's fill their heads with information and put them to work.'" He notes there are important differences because the national union in Mexico [the SNTE of now deposed Elba Esther Gordillo] is an entrenched part of the power structure.

In spring 2013, New York State authorities backed the substance of the concessions demanded by New York Mayor Bloomberg (a key funder and proponent of *Students First*) and imposed a new teacher evaluation system in response to a deadlock in negotiations between

the United Federation of Teachers and the city administration. The system closely resembles policies outlined in Mexico's constitutional amendments and specified in the earlier ACE policies, evaluations are decided 20-25 percent from the results of standardized student exams, 15-20 percent through 'in school mechanisms' and the remainder through principal observation. After two consecutive annual 'ineffective' ratings, the teacher is fired (Jaffe, 2013). In the absence of evidence of direct exchanges of policies between organizations like Students First and Mexicanos Primero, following the Globally Structured Agenda for Education (GSAE) methodology, one can conclude that Mexico and the US are both subject to a combination of influences from similar waves of policy recommendations from transnational organizations like the OECD and WB, and structural-institutional pressures from domestic business elites embedded within global capitalism (Dale, 2000).

De Panzazo! received a wide release in central Mexico through the Cinopolis movie theatre chain, whose CEO Alejandro Ramírez Magaña, is also the vice-president of Mexicanos Primero (Mexicanos, 2013), as well as coverage on Televisa in the months leading up to the 2012 national elections. The film's fervently anti-union, pro-privatization message received at least nominal support from the WB, which hosted a special screening of the documentary with a panel discussion at its Mexico City offices.¹³ A promotion for the event on the WB's website describes the film:

"The documentary features interviews with key actors in the education system, hard data, and poignant testimonials from students, parents and teachers. One can see similarities to the U.S. documentary, *Waiting for Superman*, which generated widespread debate for its biting criticism of the deficiencies of US public schools and its suggestion that teachers' unions bear a significant responsibility for them.... We hope that ¡De Panzazo! will spark the same type of debates as its U.S. counterpart, and that it continues to draw attention to a much-needed educational reform in Mexico." (World Bank 2012)

Mexicanos Primero draws similar support from the OECD. According to Navarro, Gurría delivered a video address to the organization at its 2011 general meeting soon after the release of *De Panzazo!*, praising its "exemplar work" (Hernández Navarro, 2013, 111).

¹³ An event taken seriously by the WB, the panel featured its lead education economist, Harry Patrinos and its sector manager on education, Robin Horn (World Bank, 2012).

Beyond these instances and the closely aligned policies presented above, it is difficult to know the extent to which the OECD and the WB cooperate with each other and with Mexicanos Primero in coordinating a strategy for the roll-out of neoliberal education policy in Mexico. Their relationships with each other are clearly more substantial than that of a mutual recognition of shared interests, but what is unquestionable is the strong influence of the three in the formation of policy under Peña Nieto. This is particularly evident in the case of Mexicanos Primero. As the most important representative of Mexican capitalism advocating for the privatization of education, its status at the forefront of shaping the roll-out of neoliberal education policy in cooperation with the Mexican state underlines the significance of domestic structural-institutional factors relative to the capacities of transnational institutions for determining the roll-out of policy. This is the case considering how so much of the OECD's apparent influence in Mexico as a transnational organization is actually contingent on 'domestic' political connections in the persona of Gurría, who happens to be its secretary general, with the present regime of Peña Nieto. Contrary to Peck's early description of the emergence of neoliberalism in the developing world as a result of "externally impos[ed] unbending rule regimes enforced by global institutions and policed by local functionaries" (Peck, 2002, 381), at least in the case of a contemporary mid-sized 'middle-income' state like Mexico, national capitalist classes appear to possess a substantial degree of agency in implementing neoliberal reforms in collaboration with the state. Peck himself presents a more nuanced analysis along these lines, when he and Brenner argue that:

"...it is problematic to assume that neoliberalization processes normally or necessarily move 'downwards' along a global-to-national vector....this superordinate gaze fails to take account of the strategic role of national, regional and local state apparatuses as active progenitors of neoliberalizing institutional reforms and policy prototypes, and as arenas in which market oriented regulatory experiments are initiated, consolidated and even extended." (Brenner, 2010, 195-196).

The Mexican state would surely constitute such an actor leading the implementation of neoliberal policy, without whose commitment, associated with its strong connections to Mexican capital, much of the recommendations of the WB and the OECD would be ignored (Harvey, 2007, 117).

Soon after the confirmation of Peña Nieto's electoral victory, on September 12, 2012 Mexicanos Primero publicly released the following

proposals: removal of principals from union membership and reclassification as management, the tying of teacher employment to the results of mandatory standardized evaluations, increasing school autonomy (in the sense defined by the OECD and the WB above) and removing funding for teachers on union time release (Hernández Navarro, 2013b). Shortly afterwards, Peña Nieto appointed Claudio X. González Guajardo to lead his education transition team, and lending strong support to the second and third of Mexicanos' recommendations, Gurría presented *Getting it Right*, "prepared by the OECD in the context of the agreement for a strategic alliance between Mexico and the OECD for the 2012-2018 administration." (OECD, 2013a, 5). During the following three months, Peña Nieto's transition team conducted intensive closed door negotiations with the leadership of the two opposition parties to create a top-level consensus over a significant range of proposed policies prior to any legislative debate (Bacon, 2013b). This was the political context in which the Pact for Mexico gestated before release in the form of the proposed constitutional changes at the start of the new president's term.

RESISTANCE TO NEOLIBERAL EDUCATION POLICY: THE DEMOCRATIC TEACHERS' MOVEMENT

There are many more significant actors beyond the state and business associations like Mexicanos Primero which shape the political and economic context in which neoliberal education reforms are rolled out. However the democratic teachers' movement, the National Coordinating Committee of Education Workers (CNTE), has emerged as the most important organization to contest these policies, frequently resulting in their modification or annulment. Emerging in a nationwide wave of strikes and organizing in 1979-82, the CNTE has since served as a strong pole of resistance within Mexico's largest union, the 1.4 million SNTE which following its formation in 1943, has been controlled by authoritarian leaders loyal to the national government and affiliated with the governing PRI. Though the CNTE's strength has fluctuated, it is generally considered to be the dominant force within the union in state-level locals representing roughly a third of the total membership. Much of its power is concentrated in the south, with its bedrock of support in Michoacán, Chiapas, Guerrero and Oaxaca, Mexico's poorest states with strong traditions of organizing and protest, as well as the elementary teachers' local in Mexico City. Here, the CNTE has generally led the union locals, and provided historically strong opposition to neoliberal reforms from the Secretary of Education's national and state offices. The

movement has also risen and fallen in many other central and northern states during this time (Cook, 1996; Foweraker, 1993).

Coinciding with the power vacuum following former union president Gordillo's ouster, the CNTE experienced a resurgence of energy and support among teachers over 2013 as it seized the initiative channeling widespread rank and file teacher frustration following the constitutional reforms. In the months following approval of the constitutional reforms it led short strikes first in Guerrero, followed by Michoacán, Chiapas and Mexico City.¹⁴ New outreach by the CNTE through regional meetings and forums over the summer of 2013 spread the geographical reach of the democratic teachers into northern and eastern states including Zacatecas, Chihuahua, Jalisco, San Luis Potosi and Veracruz, which previously lacked a significant presence. The broader upsurge also strengthened the movement in states where it was previously divided between dissident factions, as in Puebla and Morelos. A clear sign of the success of this movement was the Ministry of the Interior and Secretary of Education's recognition of the CNTE as a negotiating party, in addition to the official union leadership of the SNTE.

The start of the 2013-14 school year in August witnessed the eruption of full strikes by CNTE members in its strongholds, as well as new bases of support in Veracruz and Campeche. Regular demonstrations, occupations of government buildings and toll roads, and one day work stoppages in many more, led to a historic height of major mobilizations by teachers in all of Mexico's thirty-two states and the Federal District of Mexico City. While recognizing and meeting with national CNTE negotiating teams, the Interior Ministry (Gobernación) which took the lead from bargaining from the education secretary, appears to have adopted a scalar strategy according to many teacher and media observers of not yielding on the most contentious issues. These include expansion of student and teacher testing to define teacher effectiveness, the circumvention of union 'just cause provisions' to give principals discretionary power to fire teachers on the basis of these exams, and the devolution of significant school financing to local parent councils. The strongest dissident teacher sections would then be compelled to seek negotiations at the state level and thereby isolate and leave vulnerable to repression weaker regions of the movement when the former reach agreements and demobilize. Indeed, in mid-September 2013, Peña Nieto again mobilized the 'Pact for Mexico,' easily passing the

¹⁴ Information in the following section emerged principally from the author's time in Mexico City in July and November 2013 observing teacher marches, rallies and meetings, and through unstructured conversations with participating teachers, movement allies and journalists.

'leyes secundarias' (secondary laws).¹⁵ Meanwhile, negotiations continued between the most consolidated CNTE sections in Oaxaca, Chiapas, Michoacán, Campeche, Veracruz, Guerrero and their state governments, amid protests and strikes across most of Mexico and a joint encampment of the national movement in Mexico City. Tentative agreements in the first four were reached by the end of the year, with these teachers returning to the classroom and a smaller group of union activists rotating through the main protest camp in support of unresolved states (Proceso, 2013).

Is the Mexican government's apparent approach of containing opposition to education reforms in a handful of states in order to dampen a national movement, while refusing to compromise on its core policies successful? As I write in late 2014, it is uncertain. Journalists and movement participants I discussed this with in November 2013 as protests were demobilizing, believed that in Chiapas, Oaxaca and Michoacán, along with victories on local issues including hiring more teachers, settlements included a de facto agreement that these key aspects of the secondary laws would not be imposed.¹⁶ However the Interior Ministry and Peña Nieto insist that no circumventions will be tolerated from the core elements of the constitutional changes and their enacting laws, filing complaints in April 2014 with the Mexican Supreme Court that the state governments of Oaxaca, Chiapas, Michoacán and Sonora had reached agreements with their teachers that were contrary to federal legislation (Aristegui Noticias, 2014a).

In place of the standardized exams for teachers and students stipulated by ACE and the constitutional reforms in Oaxaca, an alternative union-designed program is being implemented, the 'Program for the Transformation of Education in Oaxaca (PTEO)'. In place of a reliance on multiple choice tests, the PTEO conducts student and teacher evaluation primarily through written journals, work portfolios and collective reflection. A comprehensive response to many of the deficits in education structures which neoliberal reforms like 'school autonomy' claim to remedy, the PTEO strives to increase

¹⁵ This time, with a large bloc of PRD legislators dissenting, insufficient in the face of unanimous PRI and PAN support.

¹⁶ Interview with Chiapas journalist, November 22, 2013, Mexico City; Interview with Oaxaca journalist, November 22, 2013, Mexico City; Interview with Trinational Coalition in Defense of Public Education activist 1, November 22, 2013, Mexico City; Interview with Michoacan teacher, November 24, 2013, Mexico City; Interview with Veracruz teacher 1, November 24, 2013, Mexico City; Interview with Veracruz teacher 2, November 24, 2013, Mexico City. One long time education activist disagreed and argued that agreements reached by these CNTE locals left the movement vulnerable because the key text of the secondary laws were included, and could later be put into effect by these state governments (Interview with Trinational Coalition in Defense of Public Education activist 2, November 22, 2013). At the time of writing, the full text of these agreements were not obtainable by the author.

parent connections with schools by instituting new recognized and funded committees, which in deliberations with local teachers, staff and older students can modify existing programs and timetables, such as including more indigenous language instruction. PTEO pilot projects were initiated in 280 schools across Oaxaca in May and June 2012 (Bacon, 2013). These successes in Oaxaca and their clear departure from the national plan for education reform are a legacy of years of militancy on the part of the state's teachers and their effectiveness in reaching accords with broader civil society. With their focus on democratizing public education through enriched pedagogy which recognizes teacher professional capacities and strengthened community ties through meaningful parent participation (in contrast to more symbolic forms of consultation advocated under School Based Management), the PTEO is a significant local reform contradicting neoliberal policies that are globally dominant.¹⁷ In the face of pressure from the Mexican federal government, Oaxacan governor Gabino Cué insisted that these measures, "do not contravene in any way the provisions of Articles 3 and 73 of the Constitution or the secondary laws" (Aristegui Noticias 2014b), despite the absence of standardized teacher evaluation. Oaxacan teachers continued to mobilize as the 2014-2015 school year began to ensure Cué did not succumb to this pressure. Meanwhile, the CNTE succeeded in reopening a national level negotiating table with the Interior Ministry, which could reduce pressure from the federal government against state-level agreements that circumvent Peña Nieto's reforms (Solano, 2014).¹⁸

During previous national upsurges in 1979-1982, 1989-1990 (Foweraker, 1993; Cook, 1996) and in 2008 in response to the ACE, state-level agreements were reached which combined with

¹⁷ Parental support for striking teachers during the weeks in which their children were out of school was also bolstered in several states including Chiapas and Veracruz, which made an apparent strategic error by moving quickly following passage of the secondary laws in September to publicize the exact expenses for which parent councils would now be responsible at their children's schools. The non-salary expenses included school routine maintenance, utilities and classroom supplies. Interview with Trinational Coalition in Defense of Public Education activist 1, November 22, 2013, Mexico City.

¹⁸ In the course of revising this article, Mexican teachers rallied in support of forty-three rural student-teachers in Guerrero, who disappeared in September 2014 following protests against discriminatory hiring practices. News reports suggest that many of these students were murdered by police complicit with one of the state's powerful drug cartels. In the following weeks, the CNTE, university students and families of the disappeared occupied city halls across Guerrero, calling for the return of the students and the resignation of the governor. These disappearances and acts of violence against teachers in Guerrero, Michoacán and northern border states, point to the serious threat posed to civil society by narco power and complicit governments in large regions of Mexico (Morelos 2014).

government and official union repression, led to the containment of the movement when its strongest contingents demobilized. This time with the departure of Gordillo, the balance of power within the SNTE is much more favourable to the CNTE, lending credibility to declarations that it will challenge control of the union at the national level (Solano, 2013). However, as with former president Carlos Salinas with whom Peña Nieto is sometimes compared, Peña Nieto has otherwise enjoyed significant political momentum.¹⁹

In the terms of constructing a contextual political-economic analysis, a significant factor in the unevenness of the Mexican state's success in implementing neoliberal education reforms across regions and states are the differences in the balances of class forces, with the strength of the democratic teachers' movement serving as a key variable. These findings support the claims of Harvey (2007) and others (Herod, 1997; 2001) that aside from the intentions of the state, capitalist actors and transnational organizations, the presence or absence of concerted struggle from labour and other social movements is crucial for determining the degree to which neoliberal policies are implemented. This assertion is supported by Cook (1996) and Foweraker (1993) when considered in historical perspective though the 1970s-1990s.

CONCLUSION

This paper explored the relationships of transnational actors, the WB and the OECD, alongside Mexicanos Primero, a representative of domestic capital, in working with the Mexican state to implement neoliberal education policy. I have also emphasized the role of the democratic teachers' movement as a key actor resisting this agenda. By seeking to understand the activities and relationships between these organizations and key individuals within them, I have mapped the lines of responsibility for contemporary education reforms and constructed the relevant political-economic context. My research supports and reinforces the conclusions reached by others adopting the Globally Structured Agenda for Education analytical framework, as well as other critical social scientists. While possessing significant power through access to resources and expertise, much of the WB's and OECD's considerable influence on Mexico's education system is contingent upon the political interests of

¹⁹ Peña Nieto, Mexico's business class and foreign investors overcame significant resistance to win a tremendous victory in partially denationalizing the oil and energy sectors in December 2013, which the prior two PAN administrations were unsuccessful in achieving.

the Mexican state, which themselves are shaped significantly by domestic structural-institutional pressures defined by a powerful capitalist class organized to exert its influence on policy making through groups like Mexicanos Primero. Nevertheless, the success of these groups in implementing their agenda faces an important challenge from the democratic teachers' movement, which continues to challenge the imposition of neoliberal imperatives.

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