

## ***Recovering Political Dynamics: Teachers' Unions and the Decentralization of Education in Argentina and Mexico***

*María Victoria Murillo*

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This essay analyzes the interaction between teachers' unions and government officials during the process of decentralization of education in Mexico and Argentina in the early 1990s. In spite of the simultaneity of the reforms, the relationship between teachers' unions and decentralizing governments has been different in each country. The Mexican union accepted the reform after obtaining concessions from the government that placated its opposition to decentralization. The Argentine teachers' unions militantly resisted the reforms, only to see their demands ignored by government officials.

While many theories focus on the public character of unions to explain their preferences and strategies, this is not sufficient to explain the different interactions between public sector teachers' unions and governments implementing similar decentralizing policies in these two countries. This study underscores additional factors: the influence of partisan identities, organizational fragmentation, and leadership competition.

This essay begins by analyzing the impact of the Latin American fiscal crisis on public sector reform, and then focuses on the decentralization of education as part of public sector adjustment. Next it examines the characteristics of public sector unions that should influence the preferences and strategies of teachers' unions, followed by an analysis of the different experiences of Mexico and Argentina. The final section summarizes the effect of the three additional factors on the interaction between unions and governments and offers some implications for the comparative study of unions.

### **STATE REFORM AND PUBLIC SECTOR ADJUSTMENT**

The debt crisis of 1982 hit hard those Latin American countries that had borrowed heavily during the 1970s.<sup>1</sup> In the 1980s, the economic recession increased social demands on those states. Yet the burden of their external debt deepened balance of payment difficulties, while fiscal deficits reduced the states' ability to deliver many of their social services, such as welfare, housing, and public education. This situation sharpened the distributive conflicts in the Latin American countries and further signaled

the crisis of developmentalist states and strategies of import substitution industrialization. A large part of the external debt had been accrued by the public sector following development strategies based on state intervention. In addition, in many cases, these states had bailed out private debtors as well. Therefore the public sector was directly responsible for a large part of the debt that strangled these countries. Argentina and Mexico, in particular, were among the largest external debtors in Latin America and, as a result, they suffered deep fiscal crises.<sup>2</sup>

Most Latin American governments were also trying to compensate for the curtailment of capital inflows provoked by the debt crisis.<sup>3</sup> Despite the need for stabilization and fiscal restraint, policy innovation was timid at first. Under pressure from domestic and foreign investors and multilateral institutions, Latin American governments reacted first with experimental policies aimed at dealing with the balance of payment crisis and macroeconomic instability.<sup>4</sup> In many cases, incumbent politicians even resorted to printing money as a form of fiscal revenue, therefore aggravating the problem of inflation and delaying state adjustment.

But stabilization strategies that did not tackle fiscal deficits failed. Their failure induced many governments to move toward state adjustment and fiscal restraint to obtain macroeconomic stability. Under the auspices of a set of policies labeled the Washington Consensus (Williamson 1994), they implemented programs including trade liberalization, the privatization of state-owned enterprises, public sector restructuring, and tax reforms.

Fiscal crises thus prodded most Latin American governments toward state adjustment to reduce expenditures while they tried to raise revenue through tax reforms and privatization proceeds. Bates (1996, 28) points out that politicians in diverse regions of the developing world moved toward policy innovation and institutional reform because states ran out of revenue and could no longer finance themselves. State adjustment inevitably affected the social sector. Government reformers, generally based in finance ministries, aimed both to reduce expenditures and to increase efficiency of state-provided social services, so as to compensate for the immediate hardship created by state adjustment in sectors that could not obtain private delivery of such services (Angell and Graham 1995, Graham and Naím 1997). With that objective, Latin American governments attempted to implement organizational reforms in the delivery of social services, including the decentralization of their provision and administration.<sup>5</sup>

## THE DECENTRALIZATION OF EDUCATION

For much of the twentieth century, the provision of social services in Latin America had developed rapidly and in a centralized manner, focusing especially on the expansion of infrastructure and personnel. The economic

crisis of the 1980s, however, created fiscal constraints that made the imbalance between costs and quality of services readily apparent. While recognizing the importance of public provision of social services and their remarkable achievements throughout the century, international financial institutions and technocrats in the regional governments started to pay attention to the efficiency and the quality of those services when budgetary adjustment brought their costs to the fore.

In an influential study on the efficiency of social services in the region, the Inter-American Development Bank (1996) reports that the region's illiteracy rate dropped from 49.9 percent in 1950 to 14.5 percent in 1990, while the average years of school for the labor force grew from 2.3 in 1950 to 5.2 in 1990. Life expectancy also grew from 54 years in 1960 to 69.5 years in 1990 (IADB 1996, 242). The same report, though, claims that social services are inefficient and defends strategies focused on the reorganization of social service provision to improve the efficiency of educational and health services.

Education, in particular, became an import issue for economic reformers because of its potential benefit for the development of human capital and economic competitiveness. At the same time, political reformers noted the importance of education for social equity and for the consolidation of the young democracies of the region.<sup>6</sup> In addition, public concern with education rose because the quality of education was becoming inadequate for the developing needs of Latin American countries (Puryear 1997, IADB 1996). Puryear mentions several indicators of the decay in educational quality: the repetition rate is among the highest in the world, less than half the students entering primary education graduate, and tests show that students learn less than in other regions of the world (1997, 6–7).

During the military rule of Augusto Pinochet, Chile had decentralized education to the municipal level and implemented a national, publicly financed voucher program valid for public and private schools. Following that example, several Latin American governments introduced reforms that decentralized delivery (to amplify the "voice" of the immediate consumers) or increased the competition for provision (to foster the ability of consumers to "exit" to other options). Unlike Chile, however, Argentina and Mexico attempted to decentralize education only at the beginning of the 1990s.

For international financial institutions providing funding and technical support and for governments reforming educational services, this reform was the plan that would solve many of the inefficiencies of educational systems of Latin America. Hanson argues that "increased management efficiency" and "improving the quality of education" are among the goals of all decentralization initiatives (1997, 6–7). The IADB study states, "highly centralized administered systems are very poor at

choosing the best mix of inputs, required in varied local conditions; they are also poor at adjusting to changing requirements over time" (1996, 257). Consumers, it adds, "cannot exercise choice, service providers receive limited feedback about the quality of their services . . . [and] . . . supervisors and directors have little discretion in hiring, firing, and wage setting [thus] they cannot adjust for local labor market conditions . . . and they are restricted in their ability to induce better performance" (1996, 257). Mexico's president Carlos Salinas de Gortari, presenting his Program for the Modernization of Education in October 1989, echoed these concerns when he declared, "the centralized system is exhausted and, thus, is expensive and inefficient" (cited by Arnaud 1994, 255).

According to Hanson, though, the success of decentralization efforts seems intimately tied to political rather than technical considerations (1997, 8). This is because of the number of actors involved in the process and the labor-intensiveness of social sectors. For this reason the position of teachers' unions was important to policy makers. The common assumption was that public sector unions would reject the adjustment of the public administration and that teachers' unions would reject decentralization (Puryear 1997, 14; IADB 1996, 290; Navarro 1993, 25). Hanson observes,

the likely opposition of powerfully organized teachers' unions is one of the central problems facing decentralization reforms in Latin America. This opposition is based on the fear that decentralization will break up national collective bargaining, reduce teacher power, and, consequently, result in declining salaries and working conditions. Based on the historical experiences in such countries as Argentina, Chile, and Mexico, this fear is not without justification. (1997, 9)

Hanson points out, moreover, that "neutralizing competing centers of power" is usually part of the hidden agenda of decentralization, and unions are among the target groups (1997, 7). In particular, decentralization threatens the centralized collective bargaining that strengthens public sector unions. In addition, decentralization is likely to affect the patterns of internal authority of centralized labor organizations.

The political aspect of union response therefore is important because public sector unions can have a strong impact on hindering or easing the passage social service delivery reforms. Teachers' unions, in particular, can have a remarkable influence not only on policy making but also on policy implementation, because teachers are key players in implementing the educational reform (Puryear 1997, 14–16). The actions of teachers' unions not only can sabotage or enhance reforms but can also affect citizens' opinion about the government's ability to deliver the services.

Teachers' unions have different ways to influence the policy process. They can persuade their members to support reforms despite the short-term costs by explaining the long-term benefits; they can influence public

opinion with protests and awareness campaigns. They can thus organize support or opposition to the reforms, which changes the costs of reforming for policy makers. Their preferences and strategies could have an important influence on the process of educational decentralization.

## **TEACHERS AND PUBLIC SECTOR UNIONS**

Public sector unions differ from private sector unions in various ways; most obvious is that their employer is the government. Social services in the public sector are sheltered from international competition that could curtail militancy in order to retain jobs within the country. Competition from more efficient providers is generally restricted by regulations, and job stability is generally established in social service codes. In addition, public sector unionization rates are higher, both in the advanced capitalist countries and in Latin America (Beaumont 1992, Garrett 1998, Márquez 1994). Among the influences that explain these higher unionization rates are the concentration of employment in a few individual, large enterprises, the unionization of managers who do not oppose the unionization of their subordinates, and the need for public sector practices to comply with legislation regarding union organization and recognition (Beaumont 1992).

The impact of public sector militancy is also more visible to the general public, which suffers from the deficiencies in the delivery of public services and which faces daily contact with the providers of those services. Indeed, strikes often serve the dual purpose of demanding higher wages from the government and mobilizing public opinion to call for greater budget allocations for public services.<sup>7</sup>

Employment in the public sector, moreover, is more vulnerable to political considerations and more permeable to patronage. These influences often result in employment expansion at the expense of real salaries. In addition, public sector unions are concerned with expanding their membership in order to increase their bargaining (and political) power, which is based on how much labor they control and how visible their demands are in society as a whole. Expanding membership can also compensate for the effect of salary erosion on union dues. As a result, public sector adjustment threatens not only job stability for union constituencies but also unions' bargaining power, creating extra incentives for union militancy.

Finally, following the analyses of Frieden (1991a, 1995), Swenson (1991), and Pontusson and Swenson (1996), public sector unions should have similar preferences because they organize producers of nontradable services who get hurt by reforms that should improve the efficiency and social gains of producers of tradable goods. While Swenson (1991) and Pontusson and Swenson (1996) point to the conflict of interests between private and public sector workers with regard to public sector adjustment

in Scandinavia, Garrett and Way (forthcoming) show that, in advanced industrial countries, wage militancy is stronger in the public sector than in the private sector.

Since government employers face a weaker budget constraint than private firms, they may be less motivated to resist union demands. Moreover, the strike threat in the public sector is often greater than in the private sector, since government officials may hesitate to risk a shutdown in essential services, and consequently give in to excessive union demands. Finally, the relative price inelasticity of the labor demand curve for government works leaves unions free to drive up compensation without fearing declines in employment. (Garrett and Way, 24)

Arguments based on the sectoral composition of the labor movement, the distinctions between exposed and sheltered sectors, and those between private and public employment are consistent with the Latin American literature on the cross-class coalitions between unions and employers defending protectionism and overvalued exchange rates at the expense of their counterparts in the export sector (see O'Donnell 1978; Cavarozzi 1987; Kaufman and Stallings 1991; Drake 1991; Di Tella 1965).

Thus, if public sector unions concentrate the costs of state adjustment, the benefits of which are spread across society, they should all equally reject and resist public sector adjustment in any of its forms. Education is a labor-intensive activity; teachers are distributed across the national territory and in close contact with local communities; and their protest has a strong impact on public opinion. In addition, a large proportion of education budgets is directed to salaries, which weigh heavily on expenditures. Thus teachers' real salaries are particularly exposed to public sector adjustment. As a result, they might be expected to protest vociferously against attempts to adjust the public sector by reducing the cost of education expenditures.<sup>8</sup>

The experiences of Argentina and Mexico, however, show variation in union interaction with the government and in their ability to influence policy making, although the unions studied, in organizing teachers, confronted similar decentralization policies in both countries. Sectoral characteristics and policy type are therefore insufficient to explain variation in union-government interactions.

## **DECENTRALIZING EDUCATION IN MEXICO AND ARGENTINA**

Argentina and Mexico, two of the largest and most developed countries in Latin America, have scored important successes in extending education to their populations in the twentieth century. Both countries also were among the hardest hit by the debt crisis of the 1980s. Both were moving toward economic and political liberalization, and education was an important

issue on their agendas for market-oriented reforms. In the early 1990s, each country attempted to decentralize education, both to improve its quality and to transfer fiscal responsibilities to the country's states and provinces, according to state adjustment programs under the policies recommended by the "Washington Consensus."

Although the Mexican regime was more authoritarian than its Argentine counterpart, the incumbent governments in both countries had a long tradition of populism and union-based support, centered in the Institutional Revolutionary Party (PRI) in Mexico and the Peronist Party (or *Partido Justicialista*) in Argentina. In spite of the neoliberal policies implemented, both Carlos Salinas in Mexico and Carlos Menem in Argentina maintained a populist image and attempted to implement their state reforms without incurring high political costs to their governing coalitions (Knight 1998, Gibson 1997). In particular, both governments managed to maintain the loyalty of the majority of unions to the governing party.<sup>9</sup>

Teachers' unions were visible in both countries, and they gained considerable support from public opinion for their demands, to the point of moving toward strategies of mobilization associated with social movements.<sup>10</sup> In both countries, moreover, teachers' unions perceived themselves as hidden targets of decentralization reforms (Maffei 1995; Rodríguez 1995; del Campo 1995). Nevertheless, in terms of their relationship with the decentralizing government, teachers in authoritarian Mexico seem to have done better than their counterparts in democratic Argentina.

To begin with, the Mexican education system and the Mexican teachers' union were more centralized than those of Argentina.<sup>11</sup> Mexico's National Union of Education Workers (or Sindicato Nacional de Trabajadores de la Educación, SNTE) included teachers and other employees of the education sector; it was a monopolistic union with a centralized structure and, until 1992, was affiliated with the longtime incumbent PRI. In contrast, the Confederation of Education Workers of Argentina (Confederación de Trabajadores de la Educación de la República Argentina, CTERA) was a federation of teachers' unions from different provinces that held no monopolies of representation and competed with rival provincial and national unions to represent teachers. The federation had a history of political pluralism and, during this period, the national leadership was associated with a center-left opposition coalition.

In Mexico, decentralization from the national to the state level implied the risk of weakening the union's centralized authority by splitting it into 32 parts (one for each state jurisdiction), which could subsequently evolve more autonomously from the national leadership. In Argentina, the reform affected the efforts of an already decentralized federation attempting to centralize collective bargaining while competing for membership. In both countries, unions rejected decentralization when their govern-

ments announced it. The SNTE however, suppressed its opposition to decentralization after the Mexican government met some of its demands, but the CTERA kept unsuccessfully resisting decentralization and was ignored by the Menem administration. Thus, although they faced a common stimulus, teachers' unions in the two countries interacted differently with decentralizing administrations.

### **The Challenge for Teachers' Unions**

The decision to decentralize education came after three-quarters of a century of centralized expansion of education in both countries. In Mexico, the 1917 Constitution established that primary education was to be universal, free, secular, and regulated by municipalities, while secondary education and teacher training were under the jurisdiction of the states. The Secretariat of Public Education (SEP), created in 1921, however, started a rapid expansion of the federal education system at every level, consequently increasing the centralization of education. Whereas in 1928, the SEP controlled only 20 percent of the students and the federal government paid only 6.1 percent of education expenditures, by 1991–92 the SEP was managing 65 percent of the students and the federal government was paying for 80 percent of education expenditures (Ornelas 1995). At the primary level, centralization was even more extreme: in 1992, 71 percent of students and 73 percent of teachers were in the federal system, while only 22 percent of students and 21 percent of teachers were under the states' jurisdiction (Ornelas 1995).

Centralization facilitated bureaucratization: the number of education personnel grew from four hundred thousand to nine hundred thousand between 1970 and 1980 (Ornelas 1995). This process gained power for the union in the assignment, administration, and promotion of personnel (Street 1983, 243; Arnaud 1992a, 9).

Union control over new management positions in education had several consequences. It elicited administrators' loyalty to the union rather than to the SEP, and it allowed the union leadership to control members by providing them with power over the specific work conditions of each teacher (Street 1992, 116; Cook 1996, 79). The resulting politicization of the SEP made the SEP's control of education performance increasingly inefficient, because supervisors knew that they owed their position to their union careers (Cook 1996, 85).

As a result, attempts were made to decentralize the SEP's oversight function and to move supervisory positions out of the union. These projects, however, ended up buried in drawers until 1978, when the SEP established its first deconcentration plan, creating regional administrative delegations—whose competencies, nevertheless, were reduced to handling school procedures (Arnaud 1992b, 20; 1994, 244–48).



This timid reform was followed by President Miguel de la Madrid's announcement, in December 1982, of a return to the "spirit of the Mexican Constitution" by transferring elementary education and teacher training to the states (Arnaud 1994, 248). This announcement accompanied a general trend in de la Madrid's administration toward macroeconomic adjustment and state retrenchment to cope with the impact of the debt crisis, which began when Mexico declared its moratorium on debt payments in August 1982. His move toward neoliberalism, though, was not as clear and profound as that of his successor, Salinas. Amid a significant economic crisis that provoked several changes in adjustment programs, Congress never passed de la Madrid's announced reform. During his administration, moreover, the SNTE gained control over 40 percent of the SEP regional delegations created in 1978, hindering even this timid administrative deconcentration (Arnaud (1994, 252).

In 1988, Salinas was elected in a presidential contest teeming with fraud accusations, and in which the PRI obtained fewer votes than ever before. Salinas implemented a widespread program of neoliberal reforms to revamp the Mexican economy while trying to shore up his popularity. These reforms included privatization of state-owned enterprises, deregulation, and public sector adjustment. Salinas announced his Program for the Modernization of Education at the beginning of his term, in October 1989. Unlike de la Madrid, he was able to transfer 513,974 teachers, 116,054 administrative employees, 1.8 million preprimary pupils, 9.2 million elementary students, and 2.4 million secondary students from national to state-level jurisdiction in 1992 (Arnaud 1994, 258).

In Argentina, decentralization evolved differently. Law 1,420 of 1881 established free public education, as well as compulsory primary education for all the population. During the nineteenth century, though, education was under provincial jurisdiction, except in the federalized city of Buenos Aires and the federal territories. Beginning at the turn of the twentieth century, the federal government extended its control over provincial, private education; teacher training; and, to a lesser extent, primary schools. By 1952 centralization had peaked with 42.7 percent of primary schools, 64.8 percent of secondary schools, and 82.5 percent of vocational schools under national jurisdiction (Paglianitti 1991).

The first decentralization efforts were implemented by military regimes trying to reduce the fiscal responsibilities of the national government. The military rulers suppressed social demands and repressed resistance to their policies. A military government transferred some national primary schools to provincial jurisdiction in 1968, but serious decentralization did not start until 1976. Between 1976 and 1978, the harshest military regime in Argentine history transferred most primary schools and a large portion of the secondary schools to the provinces and municipalities. As a result, when democracy was restored in the early

1980s, most primary schools were already decentralized, although secondary and vocational education remained mostly under the central jurisdiction of the national Ministry of Education.

By 1987, only 1.9 percent of primary schools, as compared with 44.7 percent of secondary schools and 32.5 percent of vocational schools, were under national jurisdiction. In contrast, 79.2 percent of primary schools, 26.8 percent of secondary schools, and 37.8 percent of vocational schools were under provincial jurisdiction; the remainder were private (Paglianitti 1991).

Menem, the Peronist candidate, won the 1989 presidential elections and was inaugurated seven months in advance because of a hyperinflationary crisis that forced his predecessor to step down. Once in office, President Menem surprised foes and followers alike by rejecting Peronism's populist tradition and implementing far-reaching market-oriented reforms, including fiscal restraint and a harsh adjustment of the public sector. Among other policies, he liberalized trade, privatized most state-owned enterprises, reformed the tax and social security systems, and curtailed expenditures and salaries in public administration. In 1991, Menem introduced a bill to decentralize education, which was passed as Law 24,049 of 1991 and enacted in January 1992. As in Mexico, this law transferred the remaining public primary, secondary, and vocational schools from national to provincial jurisdiction (Grassi et al. 1994, 95).

### **The Evolution of the Teachers' Unions**

Mexico's SNTE was founded in December 1943 as a monopolistic and centralized nationwide union. It arose from the merger of the Union of Education Workers (SUNTE), the Mexican Union of Teachers and Education Workers (SMMTE), the Autonomous National Union of Education Workers (SNATE), and the Union of Workers of Mexican Education (STERM), plus other small groups (Avila Carrillo and Martínez Brizuela 1990, 23). The PRI-controlled SEP encouraged this merger, with the motive of halting interunion conflicts among those many education unions, as well as reducing the influence of communism among some of them (Arnaud 1993). In return, the SNTE contributed to the expansion and centralization of education, which caused its membership to grow. Because the PRI also controlled the union, with its nationwide membership, the SNTE also served as a political machine for the party and played a key role on election day (Arnaud 1992b, 39–43).

In return for their association with the governing party, union leaders were rewarded with management positions in the educational structure and elected and appointed positions at the legislative and executive levels.<sup>12</sup> Centralization, moreover, strengthened the union's national leadership, sustained mainly by members under federal jurisdiction. As a

result, the expansion and centralization of education increased the SNTE's membership and strengthened its centralized national authority. In the union itself, centralization was statutorily imposed, especially since 1972, when a new PRI leader, Carlos Jongitud Barrios, and his group, Revolutionary Vanguard, won control of the union and changed its structure to centralize his control (Arnaud 1992b, 19–30).

After the 1982 debt crisis, budget constraints tightened and personnel expansion shifted to management positions, some of which were granted to the SNTE to avoid conflicts produced by the deterioration of teachers' salaries. While in the 1980s teacher salaries fell in real and relative terms, SNTE union leaders controlled teachers' discontent.<sup>13</sup> A nondemocratic union leadership holding supervisory positions thus muffled teacher demands.

According to Cook, the SNTE's increasing control over supervisory appointments coincided with increased restrictions on the internal life of the union. Delegation-level assemblies needed approval from local executive committees and were rarely convened, while the national executive committee controlled local electoral processes and the local distribution of finances, and had the power to intervene in the local and delegation assemblies (Cook 1996, 80). This situation fueled rank-and-file discontent and fostered a regional dissident movement that emerged by taking advantage of the conflict between the union leadership and the SEP created by the 1978 deconcentration. In 1979 these dissident groups created the National Coordinating Committee of Education Workers (CNTE) to coordinate different regional demands for union democratization and economic grievances. The CNTE gained control of local unions in Oaxaca in 1981 and in Chiapas in 1982 (Cook 1996; Foweraker 1993).

In 1989, the dissident movement took advantage of both the PRI's weakness (after an intensely contested 1988 presidential election) and President Salinas's calls to modernize unionism. The CNTE mobilized teachers to topple Jongitud Barrios from the leadership and to demand better wages and working conditions (Del Campo 1995; Cook 1996). According to Cook, "teachers from throughout the country engaged in work stoppages, marches, hunger strikes, and *plantones* [sit-ins] in Mexico City and regional capitals from February to May 1989" (1996, 270). Indeed, the largest demonstration of teachers' dissent in SNTE's history occurred in April, when more than five hundred thousand union members joined the work stoppages, more than half of the country's largest union (1996, 269). In Mexico City alone, "in ninety days . . . there were forty-one demonstrations, eighteen meetings, more than sixty local assemblies, six national assemblies, four forums, two sit-ins, six strikes, and thirty-two negotiation sessions" in 1989 (Arnaud 1992b, 51; for another excellent account see Avila Carrillo and Martínez Brizuela 1990)

To calm the teachers' protests, President Salinas demanded the resignation of Jongitud Barrios and the SNTE national leaders. The new leader, Elba Ester Gordillo, was also a PRI member, but she allowed dissidents to enter the national leadership by introducing proportional representation and abolishing the union's automatic affiliation with the PRI (Gordillo 1992, 21; SNTE 1995, 13).<sup>14</sup>

In Argentina, national associations of teachers identifying themselves with anarchist and socialist ideas emerged at the beginning of the century. These were followed by multiple professional associations of teachers until 1947, when the *Agremiación del Docente Argentino* (Guild of Argentine Teachers) was created under the auspices of the Peronist government. The government granted union registration to this union, which in 1952 would become the UDA (Union of Argentine Teachers). The Peronist government also passed, in 1954, a teachers' statute that established working conditions and career advancement criteria. After the 1955 coup that ousted President Juan Perón, the UDA's union registration was withdrawn and the teachers' statute was changed or ignored, depending on the successive government (Amado and Checa 1990, 17–23).

From 1955 to 1973, a period of atomization in teachers' organization ensued, although different teachers' unions made some coordination attempts. In 1973, with Perón back in power, the Peronist UDA was reorganized; also that year, in an attempt to reduce union fragmentation, 147 provincial unions founded the CTERA. The CTERA was organized as a decentralized confederation of provincial unions, and diverse partisan identities coexisted within it. It was not recognized by the state, however, or by the peak labor confederation, the General Confederation of Labor (CGT), controlled by the Peronist party. The CGT did recognize the UDA, which organized teachers under national jurisdiction and had obtained state-provided union registration from the Peronist administration.

Since the 1983 democratic transition, leaders associated with the Radical Party or with center-left parties controlled CTERA. In 1986, however, a Peronist leadership gained control of the union, joined the Peronist-controlled CGT, and attempted to centralize union organization, replacing proportional representation with a "first past the post" system (or, winner takes all in districts with lists of multiple candidates). In 1988, this group transformed the union into a federation of provincial unions. By 1991, although provincial unions resisted the financial centralization of CTERA, successive mergers led to a union per province and a union of teachers under national jurisdiction (Palomino 1995a, 9–11; CTERA 1992).

In 1991, CTERA also left the CGT and founded, with a few other unions, the CTA (Congress of Argentine Workers), an alternative peak labor organization. CTERA's national leader, Mary Sánchez, expressed her discontent with President Menem's policy turnaround by leaving the Peronist party. She joined other former Peronist and center-left politicians

in the Frente Grande (Broad Front). This group originated the FREPASO (Front for a Country with Solidarity), which would become the main electoral contender to Peronism in the 1995 presidential elections.

Meanwhile, in many provinces, other competing unions did not belong to CTERA, and some unions left CTERA in disagreement with its strategies. Since 1991, the non-CTERA provincial unions, along with the union of private teachers, have gathered into several national umbrella organizations to contest CTERA's national position. Two unions of national teachers also competing with CTERA, UDA and AMET (Association of Teachers in Vocational Education), also sometimes joined these coordination efforts. The coordination among unions competing with CTERA, though, was not very durable.<sup>15</sup>

The decentralization of CTERA and the prevalence of provincial unions even within CTERA made the centralization of collective bargaining and teaching conditions difficult, even after a law permitting public sector bargaining was passed in 1990. Although Argentine teachers' real salaries in the 1990s fell to 45 percent of their 1980 value, according to the International Labor Organization, teachers' salaries varied widely across provinces (ILO 1996). According to the Ministry of Culture and Education, teachers' monthly salaries after ten years of service ranged from US\$410 in Entre Ríos province to US\$947 in Santa Cruz province (Ministerio de Cultura y Educación 1997).

For that reason, it was hard for CTERA to centralize wage demands while decentralized provincial unions, endowed with financial resources derived from union dues, were hard to coordinate. Thus, although the decentralization of education did not affect the structure of authority of CTERA's provincial unions, it hindered the possibilities for centralizing collective bargaining, wages, and teaching conditions as demanded by CTERA's national leadership.

### **Union-Government Interactions**

The SNTE traditionally has resented all decentralization efforts in Mexico (Arnaud 1992a, 1994). In 1989, it feared that Salinas's reform would subdivide it and thereby weaken its bargaining power (SNTE 1995, 29).<sup>16</sup> Both the new PRI leader, Gordillo, and the dissidents in the CNTE thus rejected decentralization.<sup>17</sup>

To placate the SNTE's opposition, the government made concessions. These included provisions for the central government to retain control of evaluation, curriculum, and funding for training by the federal government, and the establishment of a teacher statute setting forth rules for career development and minimum working conditions. In addition, after May 1989, teachers' salary raises were established above national wage ceilings, while new pension benefits and pay incentives were created.

According to Arnaud (1994, 51), the initial 25 percent salary hike that resulted from the May 1989 agreements was 15 percent above the national wage ceiling. From 1988 to 1994, teachers' real incomes (including productivity incentives and benefits) increased from 1.3 times the minimum salary to 3.4 times minimum salary, according to union records (Rodríguez 1995; SNTE 1995, 68), and basic real salaries grew 35 percent, according to a CNTE leader (Del Campo 1995).

In any case, teachers fared better than most sectors of the economy that lost purchasing power, and they passed from the lowest average income in the public administration sector to the second-highest average income in the public sector (SNTE 1995, 112–13).

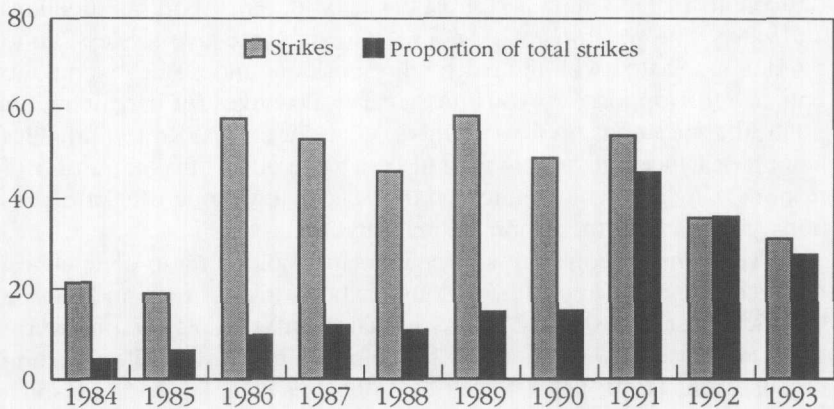
The federal government would also earmark the states' education budget instead of decentralizing financial decisions on education expenditures. This last concession guaranteed the uniformity of teachers' work conditions established in the new teacher statute for teachers coming from state and federal jurisdictions (SNTE 1995, 68–77; Arnaud 1992b, 51). These concessions facilitated the decentralization process by placating the union's opposition, but they also substantially modified its original design (Arnaud 1994, 257–60).

In this case, the interaction between the union and the decentralizing government was influenced by the partisan links between the union leadership and the government and by the level of leadership competition within the union. Although Elba Ester Gordillo was a PRI member, she faced leadership competition from non-PRI CNTE dissidents, who had to be included in the union's national executive committee through proportional representation after showing their power to mobilize in 1989. Some of these dissidents were affiliated with the PRD, which emerged as the main electoral contender to the PRI in the 1988 presidential elections.

These two factors, leadership competition and PRI control, also influenced the interaction between the SNTE and the government, because the PRI administration did not want to encourage the dissidents' influence within this monopolistic union. The government preferred to enhance the legitimacy of the union's new leader, Gordillo, and to spare her the need to show union militancy to defend her demands.<sup>18</sup> Thus the SNTE was able to obtain important concessions because Gordillo had to avoid losing control of the union (Cook 1996, 272).<sup>19</sup>

The interaction between decentralizing government officials and teachers' unions was different in Argentina. When Menem introduced the decentralization bill in 1991, most of the teachers' unions rejected the transfer. Their main concerns were the lack of provision for adequate financing for provinces and the effect of decentralization on their declining real wages and on provincial wage dispersion, once the national government relinquished its financial responsibilities. Teachers backed their demands with strikes and public demonstrations. As a result, in 1991,

Figure 1. Teachers' Strikes in Argentina, 1984–1993



Source: McGuire 1992, 1996; Murillo 1997a.

teachers' militancy was high, and their strikes accounted for more than a third of total strikes that year (figure 1). Government officials, however, ignored both their militancy and their demands. In its 1992 annual report, CTERA complained, "despite all the actions we organized to deter the sanctioning of the Transfer Law without adequate funding, we did not achieve much" (CTERA 1992, 8). CTERA's secretary general, Marta Maffei, later noted that although the union opposed Law 24,049, there was no bargaining over it, and CTERA could only exert pressure through strikes and mobilizations (Maffei 1995).

Decentralization did not have a strong effect on CTERA's national structure, although its national leaders were trying to centralize their authority. The transfer of the remaining national schools to the provinces, however, enhanced the position of CTERA's provincial unions in relation to union competitors whose structure was based on the national jurisdiction, such as UDA and AMET. UDA and AMET rejected decentralization, despite their competition with CTERA, because of its potential effect on their membership under national jurisdiction. CTERA resisted decentralization because of its commitment to uniform wage and work conditions across provinces and its partisan opposition to the government. The main concern for CTERA's unions was the effect of budgetary decentralization on their salaries, while the partisan identity of CTERA's leadership increased its incentives for militancy.<sup>20</sup>

CTERA's national leader, Mary Sánchez, not only helped establish the Frente Grande but also became a member of Congress on its slate. Her successor, Marta Maffei, has also been affiliated with a party in that coalition, the Partido Intransigente, or Intransigent Party. This association with a center-left coalition that opposed the Peronist administration made

communication between union leaders and government officials more difficult; it created a mutual distrust based on different partisan identities and views. The government did not want to appear to give concessions to a union associated with the electoral opposition, and CTERA wanted to enhance that opposition. Thus neither had incentives for bargaining. Its political associations, moreover, made it harder for CTERA to find allies among provincial governors who also saw the effects of the transfer of responsibility and who counted on the accompanying transfer of discretionary funds from the national administration.

The combination of union fragmentation and partisan competition made coordination among the various teachers' unions inside and outside CTERA almost impossible. CTERA's annual reports complained of government favoritism toward its rivals by granting registration to competing organizations (1991, 9; 1994, 1). CTERA leaders complained in personal interviews that the government also favored other unions as bargaining partners and tried to grant them control of the teachers' health fund to curtail CTERA's militancy (Araoz 1995; Maffei 1995).

By 1991, CTERA claimed 120,000 members; the combined rival unions claimed 80,000; UDA claimed 10,000; AMET 15,000; and SADOP (the private school teachers' union) 5,000 (*La Nación*, Buenos Aires, March 11, 1991, cited in Palomino 1995a, 15). A former secretary of collective bargaining in the Ministry of Education later observed that CTERA by 1991 had the fastest rate of growth and was probably more representative than its rivals (Sozio 1995).

The competition between CTERA and non-CTERA unions for the teachers' membership, however, weakened all of them. The government knew that rival unions had trouble coordinating their actions while overcoming the temptation to attract each other's members. For example, non-CTERA unions rejected the wage agreements between the government and CTERA, and CTERA rejected theirs. They also defined different strike schedules or strikes of different duration. In March 1990, for instance, CTERA called for a three-day strike and FETEN (a coalition of UDA, AMET, and others) called for a five-day strike, which was followed by a two-day strike of CTERA and another three-day strike of FETEN (*Clarín* 1990).

As a result, the government had few incentives to make concessions to unions associated with the electoral opposition or to unions that could not control their sector because of their own organizational fragmentation. For this reason, although government officials seem to have preferred unions that competed with CTERA, those unions received few concessions because they could not guarantee labor cooperation. Aside from CTERA's competition, some of them had strong preferences against decentralization. Although some of CTERA's provincial competitors obtained concessions at the provincial level (such as in the provincial welfare funds), these



did not have an important effect on the final design of a national policy, either. Neither CTERA nor rival unions exercised policy influence in educational reform.

## **EXPLAINING THE DIFFERENCE**

These cases illustrate the influence of partisan identities, leadership competition, and union fragmentation on the interaction between union leaders and government officials. Union leaders are the agents of workers. Because they want to increase their political influence to obtain concessions for their members and themselves, union leaders want to function as agents of workers in their dealings with government officials. For this reason, they have to consider the preferences of union members, at least so as to avoid being replaced by different leaders or organizations in their claim to represent workers.

In addition, union leaders want to foster coordination with other unions to strengthen their bargaining position with government officials. These officials do not want to make concessions if they do not receive a credible promise of union restraint. Both labor leaders and government officials have partisan identities, however, and prefer to deal with their allies rather than with counterparts in the opposition. Other factors being equal, union leaders also prefer to have partisan allies in the government, because such allies facilitate access to the state and increase their chances of being heard at decision-making levels. Long-term alliances between unions and political parties, moreover, are usually based on a common policy understanding of what is better for their mutual constituencies in the long run. Union leaders therefore tend more to cooperate if their partisan allies are in government, and more toward resisting government policies if these leaders are allied with opposition parties.

Besides partisan allegiances with political parties, labor unions also experience leadership competition for control of their organizations. Leadership competition usually takes place among union leaders associated with different political parties. Union leaders fear losing control of their union to other potential leaders who would supplant them as the agents of workers, reducing their ability to steer the union's interaction with the government. Meanwhile, politicians prefer that their allies retain control of unions. Leadership competition thus affects the attitudes of union leaders and politicians interacting with each other.

While leadership competition makes union leaders wary of being replaced, union competition makes them worry about losing their political influence and bargaining power if their members can easily leave their union for another one in the same sector. Union competition induces the need to coordinate collective action for the whole sector. Moreover, government officials will value unions' cooperation less if it does not

guarantee the restraint of other workers in the same sector. This provokes the need for stable coordination agreements among the unions.

Union leaders who prefer to cooperate with partisan allies in government, like the SNTE's Elba Ester Gordillo, demand concessions to provide cooperation if they risk leadership competition and have to enhance their internal legitimacy. In this case, PRI government officials preempted the union's active opposition by making concessions in the process of decentralization of education. For government officials, leadership competition signaled the risk of losing an allied union to the unpredictable, and usually hostile, camp of the opposition, and they preferred to make concessions rather than lose control of the monopolistic SNTE.

If the union dealing with the government is competing with others for the representation of workers, each union is weaker; and all of them can bargain only after coordinating their actions at the expense of their own self-interest in attracting members. Government officials, moreover, are more inclined to grant concessions to monopolistic unions than to competing unions that cannot provide sectoral restraint; and they prefer to grant concessions to allied unions rather than to those associated with the opposition. Argentine teachers suffered union fragmentation; their main union, CTERA, was associated with FREPASO, the political opposition. This situation increased the impetus for union militancy while reducing government incentives to make concessions.

Thus partisan identities, union fragmentation, and leadership notably affected the bargaining power of the teachers' unions in Mexico and Argentina. But the effect of these variables and the logic of the interaction between union leaders and government officials goes beyond these cases. Partisan identities affect the ability of nonlabor administrations to implement reforms that labor constituencies resent. Organizational fragmentation creates coordination problems that make it difficult to bargain for both politically allied and hostile unions. Leadership competition threatens union leaders' continuity in office, forcing them to show their constituencies how responsive they can be and balancing, to a certain extent, the incentives created by partisan allegiances. Therefore, these variables affect union policy preferences and bargaining power, even when unions face a common challenge in the same labor sector. They ultimately explain the larger bargaining power of a teachers' union in authoritarian Mexico than in democratic Argentina.

The impact of political dynamics on union-government relations is more marked in the public or nationalized sector, but it could extend to other cases in which the state plays a role in regulating industrial relations or production conditions.

## CONCLUSIONS

Sector-level or national-level variables explain general tendencies. Public sector unions, and teachers in particular, seem to be more militant than other sectors. Democratic countries provide more instances for bargaining over policy making for most social actors than authoritarian regimes; however, other variables need to be considered to explain the variation among cases that share sectoral or national characteristics. By focusing on the internal dynamics of unions and on their interaction with government officials, this essay has attempted to illuminate variables that can be used to explain both variations and similarities. These variables thus can broaden our understanding of union-government interaction in the process of state reform experienced not only in Argentina and Mexico, but also in other Latin American countries.

The current processes of social service reform in Latin America are removing the protection enjoyed by public sector workers by introducing competition, performance incentives, and market considerations, even in the nonprivatized public sector. These processes may make work conditions more heterogeneous across unions, and thereby may affect the internal organization of public sector unions. The shrinking of the state and the consequent reduction of state resources intensifies the competition among unions to represent the same constituencies. Moreover, democratization processes throughout the region increase leadership competition by providing external allies to internal dissidents in the unions, as shown by the relations established between the PRD and the dissident teachers in Mexico. In a democratic context, partisan identities and leadership competition modify the choices of unions and parties and can increase the responsiveness of union leaders and government officials to members' demands. Finally, although party loyalty can speed reforms and control labor unrest, it may hinder their efficiency.

While partisan identities affect the attitudes of both sides in the interaction, leadership competition gives incentives for the decentralizing government to make concessions that enhance the authority of an allied leader, as in the Mexican case. But while the leader of the Mexican SNTE was a member of the PRI supported by the incumbent administration, the leaders of CTERA were associated with the political opposition and had no relation to the incumbent administration. Nor did non-CTERA unions have much influence on decentralization policy. The weakness of Argentine teachers' unions was therefore related to their organizational fragmentation. The government perceived their difficulties in coordinating common actions and their inability as competing unions to control the behavior of teachers across the board. As a result, government officials were less inclined to make policy concessions even to unions that competed with the CTERA.

These cases illustrate the importance of the political and organizational incentives of both union leaders and government officials in any complex process involving labor relations. These dynamics are therefore worth close attention in such cases. The logic of the interaction between union leaders and government officials can extend to other unions and other sectors in modern Latin America.

### ACRONYMS

AMET .....	Asociación de Maestros de Escuelas Técnicas Association of Teachers in Vocational Education
CGT .....	Confederación General del Trabajo General Confederation of Labor
CNTE .....	Coordinadora Nacional de Trabajadores de la Educación National Coordinating Committee of Education Workers
CTA .....	Congreso de Trabajadores de la Argentina Congress of Argentine Workers
CTERA .....	Confederación de Trabajadores de la Educación de la República Argentina Confederation of Education Workers of Argentina
FETEN .....	Federación de Trabajadores de la Educación Nacional Federation of Workers in National Education
FREPASO .....	Frente para un País Solidario Front for a Country with Solidarity
PRD .....	Partido de la Revolución Democrática Party of the Democratic Revolution
PRI .....	Partido Revolucionario Institucional Institutional Revolutionary Party
SADOP .....	Sindicato Argentino de Docentes Privados Argentine Union of Private School Teachers
SEP .....	Secretaría de Educación Pública Secretariat of Public Education
SNTE .....	Sindicato Nacional de Trabajadores de la Educación National Union of Education Workers
UDA .....	Unión del Docente Argentino Union of Argentine Teachers

## NOTES

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1. On the political consequences of the debt crisis see Frieden 1991b; Kaufman and Stallings 1989.

2. In 1982, the ratio of total credit to gross domestic product was 50.3 percent in Argentina and 93.7 percent in Mexico (Frieden 1991b, 76). By 1981, the Argentine public sector owed 46.3 percent of the national external debt, and its Mexican counterpart owed 80.7 percent of the national debt (Frieden 1991b, 76).

3. Annual capital inflows in Latin America dropped from US\$52.2 billion in 1981 to US\$5.8 billion in 1983 (Frieden 1991b, 60).

4. Edwards (1995) and Torre (1997) describe the process of policy experimentation from balance of payments adjustment to trade liberalization and state reforms.

5. According to Grindle, "renewed interest in decentralization among economic reformers has generally been a result of an interest in shifting the fiscal burdens for social sector provisioning downward to more local levels of government" (1997, 15).

6. Grindle (1997) points out that while the economists in reform coalitions care about the efficiency of social services, politicians are more concerned with their effectiveness, and democracy advocates focus more on their responsiveness and participation (15–17). On the technical arguments for the importance of education for human capital and democratic consolidation, see Birdsall and Sabot 1994; Puryear and Brunner 1995; Edwards 1995; IADB 1996; Puryear 1997.

7. I am grateful to William Savedoff for bringing this point to my attention.

8. According to Palomino (1995a, 4), "teachers' wages are chosen to adjust the fiscal budget due to the relative weight of education in the budget" and the importance of personnel expenditures in the educational budget.

9. Bensusán 1994, Durand Ponte 1994, Collier and Samstad 1995, Murillo 1997b, and Zapata 1994 analyze the general relationship between the Salinas administration and the union movement. Palomino 1995b, Murillo 1997c, McGuire 1997, Levitsky and Way 1998, and Etchemendy and Palermo 1998 explain the interaction between the Menem administration and the Peronist union movement.

10. Cook (1996) and Foweraker (1993) show how Mexican teachers seeking internal union democratization in addition to their economic grievances toward the state used social movement strategies. Their repertoire of collective action ranged from institutional means, including sit-ins, hunger strikes, national marches to Mexico City, and permanent assemblies, to overseeing bargaining with the state. Palomino argues that Argentine teachers also broadened their repertoire of

collective action from mass mobilization, including parents, to hunger strikes and pop music concerts (Palomino 1997).

11. Authority can be either centralized (at higher levels of organization) or decentralized (at lower levels). The structure of authority depends on the mechanisms that allow the leadership to maintain this control. These mechanisms can be diverse: prerogatives of collective bargaining that are "imposed" on other levels, sanction powers (either statutory or financial) or financial control over lower levels, provision of selective incentives, or loyalties based on patronage or party identity. Because authority prerogatives influence the leadership's capacity to impose policy preferences on the whole membership and to negotiate the behavior of members with policy makers, the more centralized the authority (the higher the level with decision-making power), the lower the number of actors that need to be involved in bargaining to achieve the control of a larger share of members.

12. Street (1983, 243) argues that the control over administrative positions was a mechanism the SNTE used to gain access to the state and to provide social mobility for its members.

13. For example, the base salary of primary teachers dropped from 87 percent more than the minimum wage in 1982 to only 22 percent more in 1989 (Arnaud 1992b, 40–41). Meanwhile, administrative expenditures grew to 16 percent of education spending by 1984 (Ornelas 1995).

14. The new statutes proclaimed proportional representation (SNTE 1992). Dissident "members enjoyed full participation in the union's first congress after the 1989 mobilization . . . [many of their positions] . . . were incorporated into the documents and resolutions of the 1990 congress. It was also important for Gordillo that the SNTE be able to demonstrate to the Salinas government that it could generate new ideas, 'modernize' itself, and do so while incorporating the strongest elements of the opposition" (Cook 1996, 279).

15. This account is derived from a press chronology gathered in the archives of *Clarín*, including 1993b, 1993c, 1994; and *La Nación* 1991.

16. A former policy maker admitted in a confidential interview that the division of the nationwide union into 32 state unions was one of the reform's unachieved objectives. Although teacher work conditions were established periodically in the General Work Conditions for Education and wages depended on the national budget, the unions still had strong bargaining power in defining education policies and even in pressuring the government in assigning funds for education and teachers' wages. Government officials in both the Finance and Education ministries wanted to reduce such bargaining strength (Confidential interviews, 1995).

17. The weakening of the union as a hidden objective of the reform was perceived by PRI and non-PRI union leaders, according to interviews (Rodríguez 1995; Del Campo 1995). Regarding the position of the CNTE (non-PRI) dissident faction, Arnaud argues, "in the first stage of decentralization of education (1979–82), the CNTE did not confront the decentralization policy of President [José] López Portillo; even the dissident activists recognized that their emergence was linked to the conflict provoked by this policy between the SEP and the SNTE. In the second stage (1982–88) . . . the CNTE decided to reject the decentralization project of President de la Madrid" (Arnaud 1992b, 34).

18. During the reform period, opinion within the administration differed about Gordillo. She was a close ally of the mayor of Mexico City, Manuel Camacho, who opposed Secretary of Education Manuel Bartlett in his attempt to become the PRI's presidential candidate. After the reform, Bartlett would leave office to become governor of Puebla. The mixed opinion did not lessen some government officials' fear of the growing number of union activists associated with the PRI's electoral opposition.

19. Not only did dissident union leaders affiliate with the PRD, but most teacher mobilization activists expressed their distrust of the governing party. One of the songs of the 1989 mobilizations was "People unite! We are not from the PRI, we are teachers fighting for you" (cited in Avila Carrillo and Martínez Brizuela 1990, 133).

20. The political motivation of CTERA's strikes is shown by the attempt of its secretary-general to make strikes coincide with the CTA strike schedule, and by the exit of two provincial Peronist unions from the CTERA (*Clarín* 1992, 1993a, 1993c, 1995.).

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