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Protest or Politics?  
Varieties of Teacher Representation in Latin America

By Christopher Chambers-Ju

A dissertation submitted in partial satisfaction of the  
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Committee in charge:

Professor Jonah Levy, Co-Chair  
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Professor David Collier  
Professor Laura Stoker  
Professor Kim Voss

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Abstract

Protest or Politics?  
Varieties of Teacher Representation in Latin America

by

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Doctor of Philosophy in Political Science  
University of California, Berkeley

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Scholars of Latin American politics have made contrasting predictions about the prospects for contemporary group-based interest representation. Some argue that democratization creates an opportunity for societal groups to intensify their participation in politics. The expansion of political rights, alongside free and fair elections, creates space for all major groups to take part in politics, crucially those excluded under authoritarian rule. Other scholars, by contrast, maintain that neoliberal economic reforms fragment and demobilize major groups. Changes in the economic model, they suggest, have severe consequences for labor organizations, which now have a limited political repertoire.

My research challenges both of these claims, showing how the consequences of democracy and neoliberalism, rather than being uniform, have been uneven. I focus on the diverse forms of political participation by an influential societal group: public school teachers. Over the past thirty years, teachers' unions have become the largest and most dynamic sector of labor in many countries throughout the region, taking leadership positions in national union centrals. Teachers have developed contrasting types of mobilization: (1) Movementism (*movimientismo* in Spanish), based on contentious actions and protests; (2) Leftism, based on organic ties to left parties and ongoing electoral mobilization; and (3) Instrumentalism, based on flexible alliances with various parties, which negotiate for the electoral support of teachers. These three types of mobilization map, respectively, onto the cases of Argentina, Colombia, and Mexico.

These contrasting mobilizational strategies of teachers can be traced to two differences: each union's ties with its members—centralized versus fragmented; and relations among its leaders—cohesive versus divided. Centralization positions unions to participate in electoral politics, because with dense ties to rank and file workers the leadership can build a powerful voting bloc. By contrast, with fragmented relations to members, unions are unable to discipline grassroots activists or mobilize voters, and they fall back on strikes and protests. Second, leadership cohesion positions unions to take strategic actions, such as moving away from long-standing allegiance to a single party and developing instrumental alliances with multiple parties. Unions with divided

leaderships, by contrast, are more deeply rooted in longstanding partisan alliances. For them, efforts to develop instrumental alliances exacerbate factional rivalries, and tend to fail.

While the analysis focuses primarily on the evolving patterns of organization and leadership over the past 30 years, the study also steps back to consider the origins of these patterns, which were produced jointly by the initial legacy of union founding and the political opportunities that were created by democratic openings. Finally, the politics of teachers' unions is obviously of enormous importance for education policy and for national strategies to increase human capital and enhance social welfare. The study addresses these concerns by showing that alternative mobilizational strategies have important implications for education policy and policymaking. This study draws on extensive fieldwork and original data collection in Argentina, Colombia, and Mexico. It also utilizes secondary literature and archival documents to analyze how teachers' unions were founded and how they evolved in the years leading up to democratic openings.

For Angela

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## Chapter 1: The New Politics of Teachers in Latin America

This study is about the changing structures of interest representation in contemporary Latin America. It analyzes teacher representation, or the different ways that teachers participated in politics in the wake of democratic openings. Beginning in the 1980s, teachers faced new opportunities to develop new mobilizational strategies. Neoliberal economic reforms, which were implemented in the 1980s and 1990s, weakened the labor movement overall, and this was especially so in the industrial sectors. But teachers actually became more powerful; they are now the largest labor organization in the region. The expansion of free and fair elections and, in parallel, the extension of political and civil rights created an auspicious political environment. This prompted teachers to consider shifting away from the contentious and militant forms of political action they used in the past, such as protests, work stoppages, and demonstrations. They considered instead entering the electoral arena, renegotiating their alliances with political parties, and influencing policy through official channels.

By the 2000s, teachers in the region had developed dramatically different ways of participating in politics. This research examines three iconic cases, which illustrate the significant contrasts in the region. In Argentina, teachers were combative and they mobilized intractable protests in the period after military rule. Although Argentine teachers briefly experimented with electoral alliances, ultimately they defended the union's autonomy from partisan influence, and they rejected the electoral arena. In Colombia, by contrast, teacher protests declined sharply. The Colombian union became a pillar of electoral support for newly formed labor-based parties on the left end of the ideological spectrum. Teachers articulated interests through leftist politicians in government, while placing less importance on teacher protests. Still, a third pattern emerged in Mexico. Like Colombia, electoral mobilization overshadowed contentious politics, with teacher protests becoming an infrequent and episodic phenomenon. Yet, instead of supporting a left-leaning, labor-based party, the Mexican teachers' union initiated negotiations with multiple political parties, including the right-wing party. The union forged contingent political alliances in order to secure patronage resources and material benefits.

This study aims to document, conceptualize, and account for new forms of political mobilization by public school teachers. In response to democratic openings, why did teachers favor electoral mobilization in some countries and contentious politics in others? What accounts for the new relationships that teachers developed with parties? In order to answer these questions, I propose a typology of teacher activism and an analytic framework that accounts for them. I argue that, during democratic openings, a focus on the organizational characteristics of unions themselves provides the most analytic leverage for analyzing teacher activism. The different forms of political participation by teachers can be traced back to union (1) organizational centralization and (2) leadership cohesion.

Unions with *centralized organizations* mobilize in the electoral arena. Organizational centralization refers to a particular structure, one in which a single, monopolistic union organization has vast resources for top-down mobilization. Such resources include union staff, union-based member services, and deep coffers. Leaders of centralized unions have the capacity to organize large-scale collective action; they discipline union activists and mobilize their base

en masse. This enables them to deliver a large bloc of votes to a given political party or political candidate. By contrast, leaders of *fragmented unions* organize small-scale collective action and they are unable to restrain activists. These unions have a different structure: there are multiple, competing labor organizations that divide teachers into small groups, and the largest union organization has limited resources for political mobilization. They lack a critical tool, which is the ability to exert discipline on union activists. This lack of discipline contributes to both higher levels of militancy and lower levels of electoral mobilization.

Organizational centralization provides a powerful explanation of whether unions engage in militant actions or electoral mobilization. However, it cannot account for why some unions take strategic actions while others do not. These outcomes, I contend, require a closer look at another level of analysis: the upper-levels of the union leadership. Unions with a cohesive leadership have the capacity to negotiate new partisan alliances. *Cohesive leaderships* are organized around a hegemonic faction. Such a faction has a hierarchical chain of command and is so large and encompassing that it crowds out rival groups. This leadership structure is highly disciplined, which allows union leaders to endorse new political parties and to deliver support to those parties. In contrast, *divided leaderships* have strong rivalries among competing groups of leaders. These leadership remain locked in reactive and oppositional repertoires, since pressure from opposing groups makes it difficult to moderate demands. Negotiations with new parties break down because union leaders who negotiate and urge restraint face sharp criticism from rival leaders.

### *Types of Teacher Activism*

This study conceptualizes different types of political activism that are institutionalized by teachers in the wake of democratization. The concept of activism refers to the enduring political practices that labor organizations establish. It is a thick concept that contrasts differences in collective political participation along three dimensions: *contentious mobilization*, *electoral mobilization*, and *partisan linkages* (see Table 1). I apply this framework to the cases of teachers in Mexico, Argentina, and Colombia, but it could be extended to other emerging labor unions that have a mass-member base.

**Table 1**

#### *Types of Teacher Activism*

Country	Contentious Mobilization	Electoral Mobilization	Partisan Linkages	Type
Mexico	Low	High	Flexible	<i>Instrumentalism</i>
Argentina	High	Low	Non-existent	<i>Movementism</i>
Colombia	Moderate	High	Stable	<i>Leftism</i>

In Table 1, contentious mobilization refers to the recurrence and intensity of protests, strikes, work stoppages, and other industrial actions. It can be assessed using data on the number of protest events, strikers, and workdays lost in a given year. It is scored as “high,” “low,” and “moderate,” depending on the relative salience of contention in these three countries. Electoral

mobilization refers to the recurrence and intensity of political organizing during elections, the responsiveness of teachers to union endorsements, and the role of union leaders in mobilizing voters. It can be assessed based on qualitative data on the role of the union in elections, the number of union leaders who become political candidates, and the number of voters who support candidates and parties that make direct appeals to teachers. It is also scored as “high,” “low,” and “moderate,” depending on the relative salience of political participation in these countries. Last, partisan linkages refer to the exchanges and communication between the union and political parties. These can be assessed based on the endorsements of the union and the parties that union leaders support. “Flexible” linkages change across election cycles, and they may differ at the national and subnational levels during the same election, while “stable” linkages are consistent across time and across tiers of government. “Non-existent” linkages involve minimal exchange and communication.

### Instrumentalism in Mexico

Beginning in the 1990s, as Mexico continued along its protracted transition to democracy, the National Educational Workers Union (SNTE) sought to join the governing coalition irrespective of the ruling party’s ideology. Contentious mobilization in Mexico was low. During the 1990s and 2000s, the union leadership successfully demobilized teacher strikes and protests. While dissidents organized a large number of contentious actions during the 1980s, the dissident movement was unable to sustain its contentious repertoire. Teacher protests that did occur were relegated to a small number of states. They were not coordinated, and they rarely achieved national prominence. Protest became, at best, a secondary mode of interest representation because the teachers’ union had other levers to exert political influence.

Electoral mobilization in Mexico was high. SNTE became an enormously powerful political machine that formed public school teachers into a cohesive voting bloc. The union had 1.2 million members, which gave it tremendous electoral clout (it was the largest labor organization in Latin America). The union was actively involved in political campaigns. It endorsed candidates and parties, and it used its organizational muscle to get out the vote. Union leaders regularly became political candidates and electoral brokers; there was a revolving door that connected the union leadership to the national legislature (Raphael 2007, 167). Union leaders, as they rose up through the ranks, typically became professional politicians and political brokers. The union became a powerful electoral organization that had influence across territory.

The union’s partisan linkages were flexible. In a more open political context, after the hegemonic ruling party lost power in 2000, the union negotiated partisan alliances that were flexible, diversified across tiers of government, and changing over time. Scholars have long asserted that the partisan identities of unionized workers are firmly rooted in legacies of labor incorporation, and so to see union operatives breaking longstanding partisan attachments in this way is surprising (Caraway, Cook, and Crowley 2015, 4-9). Events in 2005 and 2006, surrounding the presidential election, illustrate the instrumental alliances that the union established. Historically, the union had organic ties to Mexico’s hegemonic party, the PRI. Yet in 2005 SNTE sponsored its own political party, *New Alliance*, which negotiated contingent alliances with other parties. In the 2006 election, *New Alliance* reached out to both Presidential frontrunners, Felipe Calderon of the conservative National Action Party (PAN) and Andrés

Manuel López Obrador of the leftist Party of the Democratic Revolution (PRD), and ultimately it supported Calderon. When Calderon won the presidency by a razor thin margin of 0.58%, SNTE leaders claimed credit for delivering pivotal votes to him. Calderon also appeared to believe that teachers played a major role in his electoral victory, and once inaugurated, he appointed SNTE leaders and friends of the union to top cabinet posts, including the Sub-Secretariat of Basic Education, Social Security Institute, National Lottery, and National System of Public Security. Ironically, while the PAN had campaigned on dismantling the corporatist system set up by the PRI, it ultimately formed an alliance with a union that was strongly associated with old-style PRI corporatism.

Instrumentalism had significant implications for education policy. During the 1990s and 2000s, the union's flexible alliances with multiple parties enabled it to exert enormous influence over education policy. All three parties gave the union access to high-level education policymakers. The union's policy demands were narrowly focused on securing rents and expanding patronage networks, in order to strengthen its electoral machinery (Loyo 2008; Ornelas 2012). Through its ties to Presidents Vicente Fox and Felipe Calderon, the union demonstrated that it exerted strong influence and extracted significant resources from the state (Raphael 2007, 181; Hecock 2014, 70-4). During the 2000s, the union engaged in closed, insider negotiations with PAN officials, and it secured both policy concessions and lucrative government contracts. All three parties avoided embracing education policies that teachers opposed. Presidents moved away from policy positions that were at odds with the union, and the union restricted the set of policies that could make it onto the education agenda. Instrumentalism enabled the union to exert immense influence over education policy, and to maintain its privileged position in policymaking even after its former partisan ally, the PRI, lost power.

### Movementism in Argentina

In Argentina, the Confederation of Argentine Teachers (CTERA) operated in a strikingly different way. In Argentina electoral mobilization was low. The union publicly voiced its disdain for electoral politics and refused to allow campaign activities to take place in its organization. Union leaders were wary of converting the union into an electoral machine. They worried that politicians would inappropriately exploit union resources, create patron-client relations, and corrupt the union's internal democracy. Union leaders rarely became political candidates, and when they did, they cut their ties to the union in order to avoid conflicts of interest. Despite partisan pressures, the Argentine union never formed teachers into a cohesive bloc of votes. Teachers looked down on the union's involvement in electoral mobilization, and criticized labor leaders who tried to manipulate them politically.

Correspondingly, partisan linkages in Argentina were non-existent. After the democratic transition in 1983, political parties sought to form alliances with CTERA, as they did with SNTE in Mexico. However, the union did not endorse political parties, and it asserted its distance from them. Teachers responded tepidly to political parties that conducted political outreach to them. Even when a pro-labor government was in office, the union asserted its autonomy from party politics. The union was unwilling to follow partisan directives, and to urge restraint on the part of its base.

By contrast, contentious mobilization was high. Since Argentina's democratic transition, teachers relied on movementism, that is recurrent protests and contentious mobilization, to articulate their interests. According to Gindin (N.D.: 3) the union had a tradition of "confrontation," which made it militant and combative. During the 1990s and 2000s, teachers were the most militant sector of labor in Argentina, accounting for the largest number of strikers and workdays lost (McGuire 1996; Murillo and Ronconi 2004; Chiappe and Spaltenberg 2010). Protests were cyclical, but in any given year there were typically a large number of contentious events involving public school teachers. Teacher strikes contributed to high rates of teacher absenteeism and a shortened academic calendar; students rarely received the full 180 days of classroom instruction (Murillo and Ronconi 2004; Chiappe and Spaltenberg 2010). Governments developed a policy in response to teacher protests. They offered an "attendance bonus" to teachers who never missed class, and withheld this bonus from teachers who participated in protests. This policy, however, failed to restrain teacher militancy. The threat of strikes was the primary lever through which the teacher's union articulated its interests.

CTERA's strategy of relying on contentious mobilization yielded more limited policy influence, in contrast to Mexico. The union struggled to move education policy in its preferred direction. In 1992, teacher protests failed to block a decentralization law that teachers strongly opposed. While major demonstrations, such as the White Tent (1995-1997), did yield new education laws that moved policy in a pro-teacher direction, in general protests were ignored (Suarez 2005, 173). When protests brought government officials and union leaders to the table to negotiate improvements in teacher salaries, they were unable to reach long-term agreements (Etchemendy 2011, 100-104). Policy responses to teacher protests were uneven, and improvements were only small-scale and incremental. The pro-labor, Peronist government of Nestor Kirchner enacted new education laws in 2006 to address the erosion of teachers' salaries during the financial crisis. However, even with a pro-labor government in power, protests in the provinces continued. President Cristina Fernandez de Kirchner voiced frustration with the teachers' union because of its refusal to restrain protests, even after significant improvements in teacher salaries.

The Argentine union was stuck in a vicious circle. Teacher labor grievances fueled intractable protests. However, because of the high frequency of these protests, policymakers were unwilling to respond to the full set of demands, since they thought that concessions would have little effect on teacher militancy.

### Leftism in Colombia

After Colombia's democratic opening in 1991, the Colombian Teachers' Federation (FECODE) slowly developed strong and stable ties to left parties. Although like Argentine teachers, Colombian teachers also organized protests, contentious mobilization in Colombia was moderate. While during the 1990s teacher protests were intense and sustained, by 2001 teacher protests declined sharply. The contentious strategy exhausted itself, and teachers began to assert their interests in other ways. While the union remained combative, it expressed its discontent in fiery speeches and communiqués, rather than in industrial action.

Electoral mobilization, like in Mexico, was high. The union increasingly turned towards electoral politics to articulate teacher interests. The Colombian teachers' union began to operate as an electoral organization. Indeed, left parties built their organizational infrastructure through the union. Union leaders endorsed candidates and parties, and the union mobilized its resources during political campaigns. The union had significant success in molding teachers into a powerful voting bloc. Its increasing role in electoral politics, however, created confusion about the formal and informal roles that union leaders played. Union leaders, who purportedly worked for the union and defended teacher labor rights, simultaneously positioned themselves to become political candidates, party leaders, and electoral brokers. Thus, electoral mobilization raised questions about whether the union articulated the interests of rank and file teachers, or whether it advanced the political careers of union leaders.

The union developed stable linkages to left parties. The leaders of these parties cast a growing shadow over the union, and left parties placed their cadres in the union leadership. Multiple small left parties penetrated the union. They campaigned in internal union elections, in order to win positions in FECODE's national executive committee. The union was a strategic site of representation for these parties, since leftist partisans could broaden their appeal by leading the union, and ultimately secure representation in public office. Labor leaders used the union to launch political careers, albeit exclusively through parties of the left. In 2005, leaders of FECODE helped to found the leftist party *Democratic Alternative Pole (PDA)*, which challenged the conservative government of President Alvaro Uribe and became Colombia's primary opposition party in 2006. In that year, five of the ten Senators from *PDA* had strong ties to the teachers' union.

The union increasingly articulated its interests through partisan allies, rather than through the union itself. Union leaders became policy advisers for leftist parties, and thus on education related issues the demands of the union were explicitly written into the party platform. The union delegated political negotiations on education laws to a cadre of former union leaders who took various positions in government. Because of partisan influence, union leaders began to prioritize advancing partisan interests and building political support over defending the labor rights of teachers. This created conflicts of interest, since union leaders used their official positions and resources to advance the interests of the parties they supported.

In terms of influencing policy, leftism produced mixed results. When leftist parties won public office, the union had significant policy influence. For example, during the pro-labor government of Ernesto Samper the union had significant influence. The union also exerted strong influence on education in the municipal government of Bogota, where leftist mayors were elected in 2003, 2007, and 2011. Union leaders held key positions in the city council and the Secretariat of Education. Education spending tripled over an eight-year period, and a number of pro-teacher policies were adopted, including expanded teacher training, improved compensation, and social programs that targeted low-income students. However, left parties in Colombia were small and they mostly resided in the opposition. The teachers' union was unavailable to right-wing parties as a political ally, and so those parties adopted an education platform that teachers strongly opposed. Conservative presidents embraced teacher evaluations and merit-based promotion schemes, which union leaders were unable to block. The union had policy influence when leftist parties governed, but this only happened at the subnational level. At the national

level, the union had limited influence, since the union's partisan ally was relegated to the opposition.

### *Scholarly Debates and Hypotheses*

The fundamental concern of this research is to understand why different types of political activism develop among teachers in the contemporary period. This section examines activism from two different perspectives in the literature. The first focuses on democracy and how regime openings enable new groups to engage in politics. The second focuses on neoliberalism, corporatism, and group representation, and the demobilization that occurred in the wake of a new economic model. The goal is to identify the key building-blocks for this research, and to highlight points of departure.

#### Democracy and the Expansion of Political Activism

Scholars argue that more open regimes promote political activism among a large number of societal groups. This claim is supported by recent studies arguing that democracy creates space for new forms of political mobilization. In advanced democracies, ordinary citizens continue to engage in older forms of civic engagement, they have also developed new forms, as citizens have become more highly educated and as they have gained access to new technologies (Norris 2003). Moreover, in developing democracies, civil society organizations have filled the vacuum as political parties have weakened (Hochstetler and Friedman 2008; Foweraker 2001). Democratic openings create opportunities for groups that, under repressive authoritarian rule, faced restrictions on their ability to participate in politics. Labor, for instance, has more space to articulate its interests. Authoritarian regimes crack down on unions and use repression to maintain worker quiescence. Under democracy, unions face new opportunities to organize workers and to develop linkages to parties (Caraway 2012: 278). After democratic transitions, workers expanded repertoires of contentious action, and also become a major electoral force in multiple regions of the world.

Labor groups are especially likely to take part in political action. Democracy creates opportunities for labor groups that are emerging, and growing in size and power, to intensify their political organizing efforts. Teachers are one such emerging group that merits more scholarly attention. Existing studies suggest that democracy will increase teacher influence, due to more active political participation. Authoritarian regimes adopted repressive labor policies, which constrain teacher mobilization (Schneider and Mizala 2014: 92-3). Prior to regime transitions, teachers face restrictions on their demand-making repertoires.

Scholars, such as Nelson (2007: 85) argue that, in new democracies, teachers' unions gain political influence.

Democratization is likely to enhance the relative power of providers' unions [i.e. teachers' and health workers' unions]. Political liberalization permits more open and vigorous action by unions themselves. Moreover, since consumers of services are usually less organized and articulate, competitive elections may make political parties allied with teachers' or health workers' unions or legislators who rely on unions as important parts of



their support base more responsive to union preferences.

Her argument is that the influence of public sector unions increases under democracy, because these unions can legally participate in politics. Hecock (2014: 63) makes a similar point, noting the enhanced influence of teachers, which can have perverse consequences. He highlights “the potential vulnerability of newly elected leaders to pressure from powerful societal interests [i.e., teachers] for special treatment, especially in the context of new and fragile democratic institutions.” Democracy enabled teachers to become major players in the policy making process.

Analysis of cross-national data has shown that spending on primary education increases dramatically under democracy. This finding is consistent across world regions (Ansell 2008; Stasavage 2005). In Latin America, Brown and Hunter (2004) and Segura-Ubiergo (2007) demonstrate that democracy is associated with higher levels of education spending. This increase is traced back, in part, to the propitious environment that democracy creates for teachers. As Brown and Hunter (2004: 845) note:

Teachers’ unions, which typically operate at fuller force in democratic than authoritarian contexts, might be expected to draw resources to lower [i.e., primary and secondary] levels of schooling as well. Teachers’ unions in Latin America, which are often linked to leftist political parties, tend to be quite militant. Because education expenditures in the region are weighted toward salaries, political systems that provide unions with more latitude for protest could conceivably result in higher spending on the levels of education [i.e., primary and secondary] at which teachers are most numerous.

In contrast to Nelson, Brown and Hunter emphasize how democracy creates opportunities for teacher protests, which increases spending on education. As the most organized group in the education sector, teachers exert significant pressure on elected governments. The expectation is also that teacher influence increases under democracy.

Scholars also see democracy as empowering militant groups. Tarrow (1994: 92) argues that social movements do not emerge under authoritarianism, since closed regimes “discourage popular politics.” Democratic regimes do not always bring outsider groups into institutionalized politics. Indeed, Rich (2012) shows that activism may take new forms, especially in developing democracies where grassroots activists coordinate alongside state bureaucrats. Democracy may contribute to an environment in which labor is more combative (Robertson 2004). Under democratic governance, new models of unionism have developed, such as social movement unionism, in which labor organizations forge stronger links to grassroots activists (Voss and Sherman 2000; Garay 2016). According to movement scholars, democracy sustains contentious politics, and does not inherently lead to cooptation and demobilization.

Yet, the democracy literature has three important problems. First, these studies do not provide a comparative framework for analyzing why different outcomes occur. Instead, scholars of this literature say little about the precise form that political participation is likely to take. The prediction is a uniform outcome: all previously excluded groups will participate more in politics and gain influence. Yet, I find three different outcomes that occur under democracy. Democracy is too coarse of a variable to account for the diversity among teacher organizations and their

political participation. Second, democracy assumes a tabula rasa; it does not take into account historical legacies that were established prior to the adoption of new political institutions. But organizations have distinctive historical develop trajectories, and these trajectories need to be assessed. These trajectories put organizations on different paths in the period after democracy has been established. I bring historical legacies into my analysis.

Third, the character of democratization may vary across countries, but few analysts have analyzed this character. During democratic transitions, societal actors can play different leadership roles, and these roles, in turn, shape contemporary patterns of group political participation. Groups also respond to the opportunities afforded by democratization in different ways. For the case of teachers, existing research does not specify the precise form that teacher political participation is likely to take. Analysts suggest that teachers use some combination of strikes and electoral mobilization to influence politics, but whether they favor contentious mobilization or political action is beyond the scope of the analysis. There is little work on why teachers influence policy through official channels in some countries, and opt for contentious strategies in others.

### Neoliberalism, Corporatism, and the Decline of Group Representation

Another literature suggests that neoliberalism has eroded and weakened unions. This perspective is more pessimistic about the prospects for popular representation under democracy, since underlying economic changes have fundamentally disrupted mass-based labor organizations. The claim is that twentieth century corporatist models of interest representation are no longer viable after contemporary economic shifts.

In the contemporary period, the exhaustion of the state-centered development model created growing pressure for labor parties to implement neoliberal economic reforms. These reforms disrupted longstanding union-party relations (Hagopian 2014). During the 1990s, labor-based parties in Latin America adopted these reforms. Presidents used bait-and-switch tactics, in which they campaigned against market-oriented policies but once elected, they did an about-face and embraced them (Stokes 2001). Presidents relied on their partisan linkages to labor unions to restrain worker opposition and implement market-oriented policies (Murillo 2001; Burgess 2004). Labor parties became unreliable representatives of workers.

The implementation of neoliberal economic reforms resulted in a major decline in union density (Kurtz 2004; Roberts 2014, 100). There has been a global weakening of the labor movement; the resurgence of unions in Latin America during the 2000s brought back, at best, only a diminished labor movement. The declining political clout of unions means that they are no longer large enough to deliver electoral majorities to partisan allies. Labor parties distanced themselves from industrial workers, which had been the core constituency. Instead, these parties established both clientelistic and programmatic ties to a more heterogeneous group of lower class voters, especially those in the informal sector (Levitsky 2003). With the shift in the economic model, parties shifted strategies and moved away from corporatist exchanges that were used in the state-centered development model.

Labor unions had a limited set of responses to these policy shifts, and they faced a number of unattractive options. Some remained loyal and swallowed the bitter pill of neoliberalism. Union leaders followed party directives either because they anticipated future political careers in the party, or because they received compensatory policies in exchange for accepting neoliberal reforms (Etchemendy 2011). By contrast, other unions broke ranks with partisan allies and organized protests (Murillo 2001; Burgess 2004). Militant union leaders organized resistance against erstwhile partisan allies. Overall, the implementation of neoliberal reforms drove a wedge between unions and parties, creating greater distance between them. Unions had little recourse when parties sought new coalition partners.

The decline of labor unions has prompted scholars to look at non-union organizations. They have looked at smaller, more discrete societal actors that have established corporatist relationships with the state. For instance, militant indigenous movements have gained a degree of state structuring; Ecuador and Bolivia are two cases where “indigenous corporatism” has been established, as labor corporatism has declined (Chartock 2013: 58-60; Peralta et al 2008). Another instance of non-union corporatism can be founded in state-organized policy councils for delivering social policy (Mayka 2013; Rich 2012). Studies of business associations and small industry have also emphasized neo-corporatist relations between the private-sector and the state (Schneider 2004; Shadlen 2004). In sum, the literature has searched for non-union actors that have developed more recent corporatist relations as unions have declined.

The literature on neoliberalism and corporatism, however, has four shortcomings. First, not all unions were weakened. The idea of a “segmented” labor movement is relevant here, since unions in emerging sectors are treated quite differently from stagnating and declining sectors. The persistence of strong unions, especially in sectors that have benefited under the new, export-oriented economic model, have brought a new group of workers to the fore, such as the teamsters in Argentina (Etchemendy 2011: 63). Public sector unions, and teachers in particular, are a surprising omission in the literature, since their political weight has grown substantially over the past thirty years. Emerging sectors of the union movement have quietly gained power, and structures of interest intermediation for these groups have evolved as well. Yet, little research has looked at this.

Second, some scholars argue that countries undergoing the “left turn,” namely those in the Southern Cone (i.e., Argentina, Brazil, and Uruguay) established a neo-corporatist model in which workers regained policy influence. Collier and Etchemendy (2007) propose the idea of “segmented neocorporatism,” in which the labor movement is treated quite differently in the formal and informal sectors, but where formal sector unions engage in ongoing wage negotiation with pro-labor governments. In this new context, there is less solidarity and more fragmentation in the union movement. Unions are on a spectrum depending on how closely they are allied with a left party. Etchemendy (2013) describes Argentina as a case in which the Kirchner government had a “double alliance,” that involved different relations with the teamsters and teachers’ unions. The central focus, however, is on new political outreach to labor, and revitalized union-party relations in specific countries.

Third, unions are distancing themselves from parties, rather than the other way around. Unions are not just objects of politics; they are also actors. Studies of union-party linkages have

focused too much attention on how parties moved away from unions. Yet, strong unions have not just sat idly while partisan allies left them. Defection is a two-way street. In the contemporary period, strong unions distanced themselves from declining partisan allies. Indeed, party organizations have also been disrupted by economic changes, and situations emerged in which parties are relatively weak and certain unions are strong. Labor organizations behaved strategically, taking new leadership roles in parties, building new party organizations, or shifting the programmatic profile of established parties. They continued to play a major role in party politics, and have even restructured party organizations. This also deserves attention.

Finally, this approach cannot account for the variation observed in my cases. This literature has focused more on the decline of the industrial union model, and the emergence of non-union actors that have established new corporatist relations with the state. There has been little attention to the ongoing, evolving dynamics between unions and parties. In recent years, a group of emerging unions gained prominence in politics, but scholars have all but ignored them. The relations that developed between strong unions and parties have been overshadowed by an abiding interest in labor parties and macro-level societal actors, most notably, the informal sectors that are not part of the traditional labor movement. This research seeks to address these gaps in the literature, by focusing on the case of teachers and their divergent forms of political activism.

#### *The Argument: Organizational Centralization and Leadership Cohesion*

To account for the different types of teacher political activism, I propose an explanation that centers on how unions are organized at the base and elite levels. That is, I analyze the union's ties to rank and file teachers and the interactions among labor leaders. These are, more specifically (1) *organizational centralization* and (2) *leadership cohesion*. Each of these factors generates a different component of the outcome. First, organizational centralization determines whether the union engages in electoral mobilization. If the organization is centralized, teachers are organized as a voting bloc; if the organization is fragmented, teachers organize protests and are not a coherent voting bloc. Second, leadership cohesion determines whether unions have the capacity to take strategic action. Cohesive leaderships behave strategically, and they have the capacity to organize new political alliances. Divided leaderships are reactive and oppositional, and they remain relegated to the opposition. Together, these two traits produce different types of teacher activism, influencing how teachers are inserted into politics.

**Table 2**

*Summary of the Argument*

		<b>Leadership Cohesion</b>	
		<b>High</b>	<b>Low</b>
<b>Organizational Centralization</b>	<b>High</b>	<u>Instrumentalism</u> (Mexico) - Strategic action - Electoral mobilization	<u>Leftism</u> (Colombia) - No strategic action - Electoral mobilization
	<b>Low</b>	<u>Vanguardism</u> (Peru) - Strategic action - Protest mobilization	<u>Movementism</u> (Argentina) - No strategic action - Protest mobilization

Note: Shading represents types included in this study.

Organizational centralization and leadership cohesion yield four ideal types (see Table 2). Unions with centralized organizations and cohesive leaderships are *instrumental*. They have the capacity for strategic action and electoral mobilization, which positions them to develop contingent relations with multiple political parties. Organizational fragmentation and leadership divisions, on the other hand, produce *movementism*. These unions rely on recurrent protests to articulate their interests. Organizational centralization combined with leadership divisions produce *leftism*. Unions participate in elections but do so by supporting oppositional, leftist parties; they are unable to redirect their political support away from these parties. Finally, organizational fragmentation combined with leadership cohesion produces a fourth type, *vanguardism*. As an empirical reference, the Peruvian teachers' union most closely resembles this type, since union leaders use protests to engage in strategic negotiations with presidents. Vanguardism refers to a cohesive leadership that has the capacity to take strategic action, but is unable to mobilize its base in the electoral arena.

#### Organizational Centralization and Electoral Mobilization

Organizational centralization refers to the points of communication and exchange that link labor unions to their member base. Centralization is defined by the structure of the labor movement, and whether a monopolistic union represents an entire sector of workers. Centralized unions have ample resources. They have a large staff, provide valuable services to members, have robust revenue streams, and have substantial legal powers. As a result, they play a greater role in the problem-solving strategies of workers. They help to resolve workplace disputes,

provide access to social benefits, and assist in career advancement. These unions have carrots and sticks, which they use to mobilize their base through selective incentives.

Following Collier and Collier (1979, 968-9) organizational centralization can be traced back to decisions by the state to structure and subsidize unions. Labor law grants legal privileges to teacher organizations in some countries but not others. The union's legal registry, or "legal personality," shapes its powers as a collective entity. Labor law determines the deduction and transfer of union dues from teacher salaries into union coffers; the legal barriers to the formation of rival, parallel teacher organizations; and the number of teachers authorized to remain on the teacher payroll, while they work full-time for the union. Mexico is a paradigmatic case of labor law that strengthened and centralized a union organization. Union dues are automatically deducted from teacher salaries and deposited directly into the coffers of the national executive committee. National leaders control union resources, and state-level union locals are their dependents.

State subsidies endow labor unions with a range of different functions that extend beyond representing teachers in collective bargaining. These functions include management of pension funds, health service providers, affordable housing programs, recreational facilities, and merit-pay programs. Unions that receive more subsidies have more centralized organizations because they have more extensive interactions with the base. Subsidies increase the union staff, expand the domain of interaction with the state, and finance the union's political activities (Caraway 2012, 281-2). In other words, subsidies position unions to co-govern the teaching profession, alongside the state, which gives labor organizations significant political influence.

Organizational resources are accumulated over time. They enable unions to become electoral machines that mobilize collective action on a mass scale. Centralized unions develop expansive networks of mobilization, since they offer highly valued services to members. Union leaders have significant power, which gives them the ability to rally teachers from the top-down. The capacity to rally stems from rewards that are conditioned on loyalty, and punishments for defection. In centralized union organizations, members are responsive to the leader's political endorsement. Teachers do not spontaneously form voting blocs, rather centralized organizations bring them together in the political arena.

But not all unions accumulate resources and develop centralized organizations. Lacking state structuring and subsidies, unions with fragmented organizations articulate interests through protests. In contrast to their centralized counterparts, these unions mobilize on a smaller scale, and they do so from the bottom-up. Union leaders have less control over members. They are unable to impose restraint and discipline, since they lack the tools necessary to do so. The case of Argentina illustrates this point. Labor law produced a fragmented field of teacher labor organizations, in which multiple, discrete entities simultaneously co-existed and legally represented teachers. No dominant union emerged that had the capacity to corral teachers into its organization. The fragmented structure prevented large-scale, coordinated teacher mobilization.

Organizational fragmentation had two consequences for political action. First, unions cannot form teachers into a cohesive voting bloc. Without organizational muscle, the union is incapable of convincing teachers to vote based on its political endorsement. The union, then,

does not become a strong electoral force. Second, teachers tend towards militant, grassroots activism. Recurrent protests are the product of a fragmented labor organization, in which union leaders lack the tools to reign in militant teachers. These teachers even brazenly defy the official union leadership, in some cases organizing wildcat strikes that are not legally sanctioned. The finding that weaker organizations rely on militant actions is in line with existing studies. Scholars studying social movements and corporatism note the tendency of organizations with decentralized, network-based mobilizing structure to generate a more activist base that lacks the capacity for coordination (Tarrow 2011, 131-33; Regini 1984, 128-31).

Assessing the centralization-fragmentation of teachers' unions requires rather fine-grained analysis. Throughout Latin America, the political incorporation of teachers took place later, and in a different way, than the incorporation of industrial workers. In the same country, teachers could be either more or less organized, due to a different set of labor laws and subsidies. In Colombia, for instance, teachers gained significant legal rights and subsidies in the 1970s and again in the 1990s. In that country, teachers were the strongest and most centralized labor organization. By contrast, in Argentina, industrial unions, which had ties to the Peronist party, were heavily structured and subsidized in the 1940s. Yet Argentine teachers organized much later, and lacking state recognition, they were relatively weak and fragmented. The largest teachers' organization, CTERA, did not secure its legal registry until 1985, and it received few subsidies. The national character of the labor movement does not reveal the particular organizational structure of teachers' union. Close attention must instead be given to the distinct trajectory of teacher development.

### Leadership Cohesion and Strategic Action

Leadership cohesion refers to the dynamics at the upper-tiers of the union. Whether a union acts strategically, or whether it assumes a more reactive and oppositional stance is the product of how decisions are made in the union leadership. A union's leadership is cohesive when a dominant group monopolizes leadership positions. This yields a hierarchical chain of command, and limited space for rival groups, who cannot gain significant power. I build on Kitschelt's (1994) seminal study on leadership dynamics in Social Democratic parties in Western Europe. He shows how different dynamics among party leaders shaped strategic actions. Party leaders that were autonomous from party activists introduced "innovations from above" and changed the party's programmatic appeals and core constituency (Kitschelt 1994, 213; see also Levitsky 2003, 20-1; Strom 1990, 577-8). I apply a similar framework to labor organizations. In parallel to party leaders, union leaders who were insulated from rival factions pivoted away from longstanding partisan allies. Union leaders that had internal coherence strategically renegotiated alliances with parties.

Cohesive leaderships have the capacity for strategic action because they have autonomy from union activists. When unions begin to separate from longstanding partisan allies and reach out to new parties, this change generates internal backlash. A substantial group of union leaders remain attached to the union's established partisan identity, and oppose new alliances. Cohesive union leaderships overcome this resistance. Analysts have shown how leadership cohesion enables unions to make other unpopular decisions that generate discontent. Murillo (2001, 19), for instance, shows that in the 1990s a cohesive leadership enabled unions to overcome

resistance and engage in “effective restraint,” when labor-based parties enlisted unions to assist them in adopting neoliberal economic reforms. In my analysis, cohesion has similar effects, albeit for union-party linkages. Cohesion produced a distinctive chain of command: national union leaders issued political directives and lower-level union leaders followed them. This command structure generated new union-party alliances, and it contained factional dissent.

Dominant factions that controlled the union leadership had credibility in redirecting political support. Labor leaders conducted political outreach and initiated negotiations with multiple, new parties, even when, remarkably, these parties were odd ideological bedfellows. For their part, party leaders responded favorably to this outreach since they believed that the union would either deliver political support to them, or ally with a competitor. Dominant factions positioned the union to auction its political support to the highest bidder. Unions negotiated with parties over the terms of the exchange. Unions promised to deliver a certain number of votes, and the party offered concessions in return, which took the form of favorable policy, rents, or patronage resources.

Further, the union leadership’s success in early negotiations made subsequent negotiations more likely to succeed. During an initial negotiation with a new party, when the split from the longstanding partisan ally was consummated, successful exchange yielded new resources, which reinforced the dominant faction in the union. In the next negotiation, the union could push for even more favorable terms. The union now had credibility, since it had already demonstrated its capacity to pledge and deliver its support. A cohesive leadership accumulated more resources, and it became even more powerful, both in its internal control over the union leadership, and its ability to project influence over parties. The union’s success in early negotiations, and its successful delivery on its pledges of support created feedback mechanisms that reinforced its influence.

By contrast, divided leaderships remained rooted in reactive and oppositional forms of political negotiation. Within a single union, competition among rival factions prevented negotiations with new parties, especially those that were ideologically opposed. The presence of strong rival factions constrained strategic choices. This was because any union leader that initiated negotiations with a new party faced a sharp backlash. Rivals accused union leaders who behaved strategically of selling out the union. Renegotiating partisan alliances required (a) coordination among different levels of the leadership structure and (b) some capacity to moderate demands. With competing factions, neither (a) nor (b) were possible. Competitive dynamics reinforced oppositional identities, which were framed in terms of radical ideology. Competing factions refused to follow new leadership directives, and union leaders made maximalist demands.

Leadership cohesion can be traced back to the interaction between two factors. First, the initial moment when unions were founded generated different relations among leaders. Unions that organized themselves, without assistance from the state (through a process akin to “societal corporatism”), had divided leaderships (Schmitter 1974). During the founding moment of these unions, a diverse field of leaders from different political groupings negotiated power-sharing agreements. They built a national union that sought to protect the rights of leaders with different partisan allegiances, even those from smaller groupings. As a consequence, multiple, competing



factions were baked into the union. In contrast, unions organized with assistance from the state, and achieved a degree of state structuring (through a process akin to “state corporatism”), had cohesive leaderships (Schmitter 1974, 104-5). Rather than protecting minority groupings in the union, the state favored pro-government factions. The state helped the “officially-supported” faction to concentrate power and marginalized small, rival groupings.

The founding moment of unions generated an enduring legacy: procedures for selecting new leaders. Divided unions adopted open internal union elections, in which multiple factions competed for power. Multiple groups regularly took part in contests to decide who would lead the union, and representation was often proportional to the vote share of each faction. Dominant factions, on the other hand, controlled access to leadership positions through closed, labor congresses. These labor congresses enabled the established leadership to hand-select the next generation of union leaders. Often, an entire slate of union leaders was selected via a winner-take-all formula, which provided little space for rival factions to win power. Over time, different power dynamics among leaders became institutionalized.

A second factor, electoral rules, is also important to discuss here. Factional dynamics were not just historically determined. Rather, new electoral rules, which were adopted during or after regime transitions, also influenced the union leadership. Specifically, revisions to rules governing new party formation, and reforms to the number of legislative seats assigned through proportional representation, activated new societal groups in the political arena. These electoral rules enhanced the political importance of societal groups, which as a proportion of the electorate were relatively small. Teachers, for instance, usually made up only two or three percent of the electorate. However, in many countries, new electoral rules positioned teachers to form their own teacher-based parties, or they enabled union leaders to pursue public office via personalistic electoral vehicles.

Electoral rules that provided a new pathway for union leaders to enter politics scrambled factional relations. They did so in different ways, and a rather close look at the specific features of electoral rules in a given country is required. In Colombia electoral rules made small union factions into viable electoral vehicles. The rules there effectively institutionalized the initial set of divisions in the union leadership among competing leftist groupings. By contrast, in Mexico, electoral rules created inducements for the union leadership to form an encompassing teacher-based party, small factions were not big enough to secure a legal party registry, which reinforced the dominant leadership faction. The electoral system positioned this faction to serve as the basis for a new political while simultaneously preventing rivals from creating competing electoral vehicles. Finally, in Argentina, electoral rules aggregated votes in provincial districts, which accentuated regional divisions within the union leadership. These rules disaggregated teachers into small, territorial voting blocs, and hindered coordination. In sum, the ways that electoral rules created different pathways for union leaders to access public office had downstream consequences for factional dynamics in the union leadership.

Teachers’ unions had different degrees of leadership cohesion. Teachers’ unions that concentrated power in the union leadership undertook strategic interactions with parties. These unions were likely to engage in negotiations, and had the possibility of crafting alliances with odd bedfellows. On the other hand, divided leaderships were more oppositional and reactive.

They lacked the ability to coordinate and moderate demands. Leadership cohesion-division was produced by the interaction between legacies of union founding and electoral rules. Depending on the nature of this interaction, either a dominant faction was institutionalized or power-sharing arrangements were locked-in.

### *Research Design*

This section describes the research design and the logic of inference. This research is based on a small-N comparison of three teacher labor organizations, focusing on the period between 1990 and 2012. This cross-case comparison is conducted alongside rigorous within-case analysis. Although not without its limitations, this approach enables me to identify causal relations, to leverage multiple pieces of evidence, and to consider relevant counterfactuals.

My research compares a single sector of labor in multiple countries. Throughout Latin America, teachers' unions established a mass-member base, a national leadership, and union locals spread out across territory (teachers could be found in the largest cities and the smallest towns), and a complex relationship with the education bureaucracy. By the 1990s, teachers had taken prominent leadership roles in national labor centrals, and oriented the political strategies of smaller labor organizations. By focusing on a single sector of labor, I can isolate key differences among these unions that account for their different modes of political activism.

I selected the cases of Argentina, Colombia, and Mexico for two reasons. First these cases maximize variation on the outcome variable. They showcase the range of different ways that teachers participated in politics after democratic openings, which facilitates theory building. Other country cases in Latin America are likely to resemble at least one of these three cases, which suggests that my findings will travel across the region. Second, this comparison set enables me to eliminate rival explanations. I included countries that had both labor-mobilizing and elitist party systems; that implemented neoliberal reforms in different ways; and that had different experiences of electing leftist governments during the 2000s. These three cases, then, enable me to show that existing explanations, especially those related to the implementation of neoliberal reforms and the left turn, cannot account for the outcomes that are observed.

To identify causal mechanisms, I conducted rigorous within-case analysis. This started by collecting all available single-country monographs of teachers' unions that were authored by Latin American scholars. I identified a number of country experts who had written extensively about teachers in their home country. My task was to build on this work by putting this research into comparative perspective and drilling down into the political aspects of teachers. Most of the Latin American scholarship was historical and it tended to focus on labor laws and policy shifts, rather than on how teachers participated in politics.

I then conducted interviews with union leaders and other observers. In total, I conducted 150 interviews with union leaders, politicians, journalists, academics, and policy experts over the course of 18 months. Across Latin America, teacher protests, the participation of teachers in elections, and teachers' alliances with political parties are much discussed, both within unions and by outside observers. I gained unprecedented access to union leaders by taking advantage of the factional differences within unions. Union leaders from dissident factions were willing to

discuss sensitive topics, such as the partisanship and electoral mobilization of teachers, because they wanted to disclose conflicts of interest and malfeasance involving incumbent leaders. A central contribution of this research is the original interview data that I collected, which illuminates the internal operation of these unions.

After conducting within-case analysis, I proceed to make cross-case comparisons. I constructed original datasets of teacher protests and the recruitment of union leaders as political candidates across the three country cases. Bringing together multiple datasets on teacher protests, from three different countries and across different time periods, required establishing measurement standards. Ultimately, I found that counts of the number of teacher protest events were the best indicator of the overall level of teacher labor conflict in a given country. This indicator had more measurement validity than the duration of labor conflicts, the number of strikers, or the number of workdays lost.

I also built an original dataset of the recruitment of union leaders as political candidates. I mined databases of legislative CVs and conducted interviews to validate my lists of politicians who had ties to the union. This dataset provides an indicator of the overall level of electoral mobilization by teachers since the voting behavior of teachers, as a group, can only be measured through surveys. It also sheds light on the partisan identities and types of electoral districts where union leaders were most frequently elected to public office. These new datasets serve as the basis for conducting more comparative research on teachers' unions in other countries, since the procedures used for building them could be easily exported.

### *Chapter Summaries*

The argument in this dissertation is developed as follows. Chapter 2 analyzes the historical building blocks, the process of teacher incorporation, that drive my argument. This chapter charts the evolution of teacher organizations and leadership structures, and how they were recognized and subsidized by the state. It considers the founding moment when unions were established and the subsequent enactment of landmark teacher labor laws (or lack thereof). This chapter lays out the “critical antecedents” that set the stage for the analysis of each country case, which focuses more on the past thirty years. Union organizations are big and slow moving variables that are the product of accumulated demand making. Incipient organizational machinery and factional dynamics could be identified by the onset of democracy. The historical component of the argument is fleshed out here, and the three empirical chapters (Chapters 3-5) focus on the democratic opening.

Chapter 3 turns to the Mexican teachers' union, which forged contingent alliances with multiple political parties. During the early 1990s the ruling party, the PRI, promoted the union in order to bolster the PRI's embattled political coalition. As a consequence, the Mexican union developed strong organizational machinery and the ability to mobilize its base in the electoral arena. Moreover, national leaders controlled union finances and career ladders, and regional union leaders were their agents. With a strong organization and a cohesive leadership, after Mexico's political alternation in 2000 the union moved away from the PRI. In 2005, the union launched its own teacher-based party, and developed contingent alliances with presidents and governors from all three parties. The dominant faction that controlled the union leadership had

considerable leeway in negotiating new partisan alliances, since rival factions posed a weak threat.

Chapter 4 applies the argument to the Argentine union, which relied most closely resembled a social movement. Military rule weakened the Argentine union. After democratization this union had to be built from scratch. It had weak organizational machinery and a factionalized leadership. Although Peronist union leaders tried to consolidate the union, they were unable to root out rival factions. As a consequence, the Argentine teachers' union relied on protest, rather than electoral mobilization, to advance its interests. The ongoing influence of multiple factions prevented the union from supporting new parties. Indeed, even when the pro-labor government of Nestor Kirchner and Cristina Fernandez de Kirchner reached out to the union and enacted landmark labor laws for teachers, the union refused to restrain provincial teacher strikes that discredited the pro-labor government.

Chapter 5 analyzes the Colombian union, which was fused into leftist parties. During the 1990s a pro-labor government promoted the Colombian union, which developed strong organizational machinery. However, factionalism continued to divide the union leadership. The Constitution of 1991, which enabled union factions to launch competitive bids for the Senate as personalistic electoral vehicles, reinforced the factional splits within the national executive committee. With strong organizational machinery and the opportunity to win positions in the Senate of the Republic, the union organization was transformed into political machinery. However, unlike its Mexican counterpart, the Colombian union was unable to negotiate new partisan alliances. Union factions maintained organic ties to small, leftist parties. Competition among these factions made it difficult for union leaders to negotiate with new parties, even though some tried to do so.

Chapter 6 summarizes the argument. It then analyzes how teacher politics can be interpreted within the framework of political incorporation, and how teacher activism influenced education policy. Contrary to existing studies, this chapter shows how the influence of teachers was uneven, depending on how teachers participated in politics. Finally it discusses the implications of this analysis for broader, comparative questions, such as elite counter mobilization against teachers' unions, and a normative framework for thinking about the political participation of public sector workers.

## Chapter 2: Early Development Trajectories

This research contends that the different development trajectories of teachers' unions shaped their interactions with political parties in the wake of democratization. A starting point for this analysis involves tracing the origins of teacher labor organizations and the process by which they built centralized, national organizations. As discussed in the previous chapter, centralization refers to two interrelated concepts: (1) whether a single union organization represents all public school teachers, and (2) the density of the linkages that connect the union to teachers. In what follows, this chapter first compares the distinct patterns of political incorporation followed by industrial workers and teachers. It then goes on to analyze the cross-national differences among teachers' unions as they established national organizations. A central focus of the analysis is whether unions were organized from below by the leftist opposition, or were instead controlled from above by the ruling party.

Prior to the onset of democratization in the 1980s, the degree of union centralization varied across countries. As shown in Table 3, during this period Mexico achieved a high level of centralization, Colombia achieved a moderate level, and Argentina achieved only a low level. Union centralization happened the earliest and went the farthest in Mexico; it happened later, and went less far in Colombia; and it happened the latest and remained an incomplete project in Argentina.

**Table 3**

*Timing and Degree of Teachers' Union Centralization*

	Argentina	Colombia	Mexico
Initial year of centralization	1973	1959	1943
Degree of centralization	Low	Moderate	High

Differences in union centralization did not always exist in Argentina, Colombia, and Mexico. In the early 20<sup>th</sup> century teachers' unions in Latin America had a common starting point; they were all fragmented and politically weak. Public school systems covered a small fraction of school-aged children, many children did not receive any formal education whatsoever, which meant that the teaching profession was also small. Meanwhile parochial schools played a major role in the education system, augmenting the state's provision of education. The public school system was partitioned into multiple, separate subsystems. When the state intervened by moving towards universal public education, both regional and national governments hired teachers, engendering sharp divisions in the profession. In general, teachers in rural, primary schools (who were mostly women) and teachers in urban, secondary schools (who were mostly men) received different levels of compensation and labor rights. These barriers stymied efforts to build encompassing, centralized union organizations.

After Latin American countries constructed systems of mass public education, teachers established national organizations. Teachers' unions everywhere pushed for national legislation that regulated public schools and unified the teaching profession across professional categories. Some unions, such as the one in Mexico, centralized early, bringing *all* education workers under

its organizational umbrella. In Mexico, the federal government established a national teacher labor code. During the 1950s, the ruling party promoted pro-government union leaders, who centralized power and cemented the union's ties to the PRI. In other countries, ruling parties neglected the teacher movement, which resulted in partisan divisions among teachers. In Argentina, for instance, the Peronist party did not promote the teachers' confederation, which remained dependent on provincial organizations and was loosely organized around opposition factions.

The legal recognition and nationalization of teachers' unions occurred after industrial unions, making existing explanations of union-party linkages inappropriate. Rapid industrialization in the first-half of the 20<sup>th</sup> century produced blue-collar workers. During the critical juncture of labor incorporation, reformist presidents brought industrial workers together in highly centralized, corporatist unions. These presidents organized blue-collar workers into a cohesive voting bloc through labor organizations, which served as the infrastructure for strong populist parties. While public school systems expanded dramatically after industrialization, organizing teachers was a slower process. Teacher incorporation lagged behind industrial worker incorporation, since public school systems matured in the 1960s and 1970s. As a consequence, the centralization and partisan alignments of teachers' unions differ from established accounts of labor politics.

This chapter is organized chronologically around one critical event, the centralization of national teacher organizations. The first section compares teacher incorporation to blue-collar worker incorporation, noting that the former followed a different pattern than the latter. It then turns to the early teacher movement, describing how teachers throughout the region were initially divided and weak. Church-state conflict and early public school systems shaped the development trajectories of teachers' unions. The next section examines how teachers' unions organized and their different paths to union centralization, noting how a liberal teacher labor code stymied union centralization efforts in Argentina. The conclusion sketches out how teachers were organized and how they engaged in politics on the eve of democratic transitions.

### *Manufacturing Versus Teachers' Unions*

Studies of the comparative development of the labor movement have focused on the unionization of industrial workers and their incorporation into political parties. Teachers received little scholarly attention; during the early 20<sup>th</sup> century, they were not at the forefront of the labor movement, although by the 21<sup>st</sup> century they were a leading sector of labor. This section examines how teachers deviated from the pattern of political incorporation described for industrial unions. Industrialization and urbanization spurred the development of industrial unions, but the development of teachers' unions was shaped by a different set of processes: the expansion of public school systems and efforts to reduce the Church's role in education.

The political incorporation of labor occurred during the 1930s and 1940s, as countries in Latin America transitioned from an agricultural to an industrial economy (Collier and Collier 1991). Reformist political elites built new political coalitions that either mobilized or restrained the working classes. Elite strategies shaped how labor unions were legalized, the inducements and constraints that brought them together, and the partisan identities that workers took on in the

manufacturing sectors. During this process, blue-collar workers developed longstanding attachments to either populist or leftist parties. The industrial working classes became a “coalitional fulcrum” that profoundly influenced the structure and stability of party systems (Collier and Collier 1991, 40).

During this same period, teachers were a small, albeit growing, sector of labor, in comparison to industrial unions which organized workers in multiple manufacturing sectors. The teacher labor movement developed late. In Latin America, industrialization took place before modern systems of mass public education. Early industrialization did not create strong demand for a highly-educated work force. The early phases of import-substitution industrialization focused on consumer non-durable goods, which did not require highly educated workers. As industrialization progressed towards more capital-intensive industries, businesses demanded higher-skilled workers with more education. Education coverage expanded in the 1950s and 1960s, during the later stages of industrialization when the combined pressures of international norms, teachers’ and parents’ demands, as well as demand for skilled workers induced governments to expand public education.

Teachers developed a distinct political identity in the labor movement. Whereas industrial workers had low levels of education, worked in the private sector, and were overwhelmingly male, teachers had high levels of education, worked in the public sector, and were overwhelmingly female. Initially, teacher training was meager, especially for primary school teachers, but over time teacher credentialing requirements were put in place and the profession increasingly obtained university education and advanced training. Teachers were not affiliated to the same labor centrals as industrial workers because they worked under a different labor code.

In many countries, populist parties established longstanding ties to blue-collar, industrial unions. These unions could be brought into corporatist bargains. Labor-based parties secured the political loyalty of industrial workers by extending landmark labor laws that empowered union leaders. These leaders gained top-down control over workers, through inducements and constraints that had elements of coercion (Olson 1965, Ch. 3). Meanwhile, parties offered workers dramatic improvements in wages and fringe benefits. The ties between populist parties and industrial unions endured for decades, even when labor parties embraced the neoliberal economic model in the 1980s and 1990s (Murillo 2001, Ch. 2; Burgess 2004, Ch. 1-2; Caraway, Cook, and Crowley 2015, Ch. 1). Legacies of labor incorporation were discernable well into the 21<sup>st</sup> century.

Teachers were more resistant to populist-party control. Populist parties used similar strategies to try and control teachers, providing inducements to union leaders who supported pro-government union leaders and imposing constraints on dissident activists through restrictive labor laws. Yet, these measures were less successful. They either failed to secure teacher loyalty (e.g. Argentina) or they were insufficient to prevent dissidents from challenging the officially recognized leadership (e.g. Mexico). Teachers were incorporated into politics later and they often received fewer benefits in corporatist arrangements relative to industrial workers. During the 1960s, for instance, teachers in many countries became restive and disloyal to ruling parties, after enduring longer periods of stagnant wages and inadequate fringe benefits. Teachers gravitated towards left parties, proving difficult for populist and traditional parties to control.

Teacher incorporation is a different pattern that deviates from the established labor narrative. Examining the development of mass public education helps to account for the diverse trajectories of teachers' unions. In the early 20<sup>th</sup> century ruling parties had governing agendas that shaped public schools and teachers. In Argentina and Colombia, elite projects neglected teachers, deferring the creation of teacher labor organizations. In Mexico, elites sought to challenge the Church by expanding the state-controlled public school system and building a powerful teachers' union.

### *Fragmentation in the Early Teacher Movement*

The teacher labor movement in Latin America was fragmented during the early 20<sup>th</sup> century. Public school systems were initially disorganized and education coverage was low, which produced small, weak teacher organizations. The expansion of public education occurred in an ad hoc fashion. During the 1940s and 1950s, national and regional governments simultaneously hired teachers and built schools, constructing parallel systems of public education. The teacher movement was fragmented, with multiple unions representing the various categories of teachers, different regions, and competing parties. This section examines the cases of Mexico, Colombia, and Argentina *before* national teachers' unions were established, in order to understand how elite projects influenced education and union development.

### Teachers After the Mexican Revolution

The Mexican Revolution (1910-20) set in motion the creation of a large, secular public school system. The revolution empowered liberal groups and challenged the Church; the Constitution of 1917 declared the separation of church and state. The post-revolutionary government's push for state-run public schools gave birth to a centralized education system. In 1921, President Alvaro Obregon decreed the creation of the federal Secretariat of Public Education (SEP), which launched a center-led process of education expansion. This Secretariat was in charge of the entire public school system, which covered elementary, secondary, remote, university education levels, as well as teacher training. Revolutionary governments sent teachers to rural communities to politically orient peasants and institutionalize the revolution. The aim was to expand secular education and to crowd out parochial schools.

The government of Plutarco Elias Calles (1924-28) set populist, education policies, which went hand in hand with anticlerical laws that he violently enforced. Indeed, the Church in Mexico came under siege during and after the revolution: "in Mexico in particular the Church was subject to the most extensive anticlerical movement anywhere in the region" (Collier and Collier 1991, 114). Calles' strong stance against the Church prompted regional rebellions by lay Catholics, known as the Cristero War (1926-29) (Collier and Collier 1991, 222-3). After putting down these rebellions, after and 4,000 priests were killed or expelled from Mexico, President Calles pushed for a state monopoly on education. He replaced schools run by the Church with secular, "socialist" schools. These early policies produced a massive, state-run public school system and a diminished parochial system. By 2006, Mexico had the largest public primary and



secondary school system in Latin America; 88% of students were enrolled public schools, while only 12% were in private schools (Pereyra N.D.).<sup>1</sup>

While federal government played an outsized role in directing the expansion of public education after the Mexican revolution, there were parallel public school systems. Both the states and the federal government built schools and hired teachers, which meant that there were different categories of teachers. The more economically developed states in Northern and Central Mexico, such as the State of Mexico, Chihuahua, Puebla, and Nuevo Leon, had their own public school systems. The federal government played a larger role in poorer states in Southern Mexico, such as Oaxaca and Michoacan, where state governments had fewer resources (Munoz 2016; Ornelas 2016 – 19 of 31 states have their own public schools).<sup>2</sup>

In both the federal and state driven education systems, however, the education bureaucracy and schools fell under the influence of patronage politics. Teachers were hired without significant training, based on political connections. An informal institution developed whereby teaching positions could be bought, sold, and bequeathed to next of kin. Even after teachers fell under formal labor laws, legacies of informal, patron-client based exchange remained in place into the 21<sup>st</sup> century.

The complex public school system produced countless regional and local teachers' unions. The revolution energized left parties and factions loyal to personalistic labor leaders. During the 1930s there were more than 700 teachers' unions, including two national organizations. Bringing these groups together involved a process that spanned decades. There were a number of state-sponsored unity congresses during the 1930s and 1940s, in which leaders of the teacher movement negotiated union centralization (Cook 1996, 62). President Lazaro Cardenas (1934-40), who implemented major agrarian reforms and incorporated peasants, workers, and the military into a single party organization, was unable to build a national teachers' union (Cook 1996, 62). Cardenas prioritized rural workers, founding the National Peasant Confederation (CNC) and the National Labor Central (CTM). For teachers, the unity congresses he organized failed to produce a single, national union. The teacher movement remained fractious, continuing to have leftist factions hailing from the Communist party and personalistic factions that were unwilling to come together (Espinosa 1982; Ornelas 2008).<sup>3</sup>

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<sup>1</sup> Ana Pereyra. N.D. "La fragmentación de la oferta educativa: la educación pública vs. la educación privada" *SITEAL* Boletín No. 8.

<sup>2</sup> Aldo Munoz correspondence January 4, 2016. "In 1992, when decentralization began [in 1992], there were Mexican states that had their own "state-level" education system the cases were Estado de Mexico, Chihuahua, Puebla, and Nuevo Leon, among others. Decentralization had a greater effect on states that had the federal education system, like Michoaca, Oxaca, and Guerrero, among others. That is to say, the centralization that began in 1921 was about building school systems in states that hadn't developed their own systems while decentralization in 1992 was about giving the state governments responsibility for the administration of the education system – both the 'federal' and 'state' public school systems."

<sup>3</sup> After the teacher movement started to consolidate, the left continued to exert influence within the union. There were questions about the partisan linkages of teachers: "a key issue was the question of the union's relationship to the government and whether the new union should participate in politics through the government's Partido de la Revolucion Mexicana (Party of the Mexican Revolution, PRM) or through a new party of its own creation" (Cook 1996, 63). The left was initially strong and active within the teacher movement; the teacher movement was divided among a large number of small unions.

The emerging hegemonic party in Mexico sought to overcome the fragmentation in the teacher movement. This party sought to build encompassing sectoral organizations that organized all workers in a given category, along the lines of state-sponsored corporatism, and attached these workers directly to the party apparatus. The party sought to bring teachers together in a centralized labor organization. These efforts began during the 1920s and 1930s. The process of building a national union was slow and incremental. Organizing teachers, which at that time were a small and relatively weak group compared to industrial workers and peasants, was deferred until after the Revolution took a conservative turn. The centralization of education was linked to the PRI's project of control, modernization, and crowding out the Church.

### The Traditional Parties, the Church, and Teachers in Colombia

Whereas the Mexican Revolution set in motion a massive public school system as a challenge to the Church, in Colombia the Conservative party's elite pact with the Church meant that the state's role in public schooling was restricted. As a result, public schools expanded more slowly. Between 1903 and 1930, hegemonic rule by the Conservative party and the Organic Law of Education limited the national government's role in providing public education. Instead, the Church was a major provider of education; departmental and municipal governments were responsible for building schools and paying teachers. The lack of state involvement however produced worse results in terms of overall learning. Rates of illiteracy remained higher in Colombia in comparison to both Mexico and Argentina (Engerman et al 2002).

Rule by the oligarchic, Conservative party retarded the development of public education. During the period of Conservative Hegemony (1884-1930), during which this party continuously controlled the presidency, the Church maintained its role in providing mass religious education. The Constitution of 1886 put in place an anemic public school system; the Church remained in charge of the majority of secondary schools and universities. This constitution enshrined Catholicism as the official religion of Colombia; there was no separation of church and state. Violent conflict between the Liberal and Conservative parties resulted in multiple episodes of civil war, including the Thousand Day War (1899-1902), were motivated in large part by issues related to religion and education. The Liberals wanted a liberal and secular state. They used public education based on science to attack the privileges of the Church, while Conservatives defended the Church.

In 1903 the Conservative government, firmly in power after defeating the Liberals in the Thousand Day War, enacted the landmark Organic Law of Education, which slowed efforts to establish universal public education. This law purported to modernize public education in Colombia, although, in fact, it did nothing of the sort. It failed to increase literacy and expand public school enrollment (Bocanegra 2013, 106-7). Instead, it strengthened the Church's position in providing secondary schooling and university education. The Church profited handsomely, parochial schools receive state subsidies as well as tuition payments from middle and upper income families (Bocanegra 2013, 123). By 1920, the Church was in charge of 50% of secondary schools; state-sponsored secondary schools made up only 40% of the education system; the remaining 10% were non-religious private schools. Conservatives restricted state finances to

public schools, and public schools were required to teach Catholicism, while scientific and political books were banned.<sup>4</sup>

The Organic Law of Education circumscribed education to a privileged minority; the masses did not have access to free public education. The national government played a limited role in public education. In 1928 the national ministry of education was founded, but initially it took an indirect role in the provision of education; instead, it only offered pedagogical materials to schools and set the curriculum (Bocanegra 2013, 106-7, 125). Colombia's 32 departments were responsible for hiring and paying teachers, while municipalities built schools. Teacher wages varied across departments; they were higher in wealthier departments and lower in poorer, more rural ones. Women teachers taught girls and were paid less; male teachers taught boys and were paid more. Without the leadership of the national government, the education system did not provide equal access to all Colombian citizens.

Departments paid teacher salaries. They levied a tax on alcoholic beverages, or they issued special bonds. Most departments had a weak tax base and had a difficult time paying teachers. In hard times, teachers were paid IOUs. In some cases, teacher salaries were not paid at all. Instead, departmental governments compensated teachers with bottles of *aguardiente*, a liquor, or tobacco products that teachers had to sell on their own. The irregularity payment schedule meant that teachers had to build up their savings (which was difficult given their meager salaries) or survive on credit. The refusal to pay teachers generated early episodes of labor conflict. For example, in the department of Nariño in 1923, teachers went on strike because their salaries were not paid for eight months. Teachers also lacked pensions. When pensions did exist, teachers often had difficulty accessing them when they retired (Bocanegra 2013, 110).

The dearth of national education law abetted a school system in which clientelism flourished. Teachers, especially those working in rural areas, were usually hired without holding a teaching degree, based on political connections to a local party boss (Duarte 2003). Teachers, who were mostly young, single women, were typically not political brokers themselves, but they had family members who were (Bocanegra 2013, 119). Moreover, teachers from opposition parties could be transferred to far-flung rural school merely for being affiliated to the wrong political party. They could also be suspended, laid off, or even permanently fired. Teachers were vulnerable to clientelism, particularly as mass education expanded and new teaching jobs were created (Duarte 2003). They faced the vicissitudes of the political business cycle: "teachers were hired en masse at election time, with little or no regard to the availability of funding (far less actual need)" (Lowden 2004, 353). There was no formal pay scale, tenure, or fringe benefits. A municipal council, made up of the parish priest, mayor, and municipal treasurer, supervised teachers, evaluating their moral character. Teachers faced disciplinary actions if they failed to attend church services or if they exhibited moral vices. Colombian teachers were referred to as *apostles*, because their dedication to the vocation of teaching was supposed to be based on moral conviction, rather than a reasonable standard of living.

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<sup>4</sup> Education observers from Germany thought that public education in Colombia should be provided by the state, and that there should be merit-based exams for entrance into the teaching profession – which the Conservative party opposed.

In 1929, the Great Crash helped to bring an end to Conservative Rule, and to mark the beginning of the Liberal Republic (1934-46). During this period, public school expansion gained momentum. President Alfonso Lopez Pumarejo (1934-38), of the Liberal party, made education a top priority. In his inaugural address he said:

We don't have elementary and high school teachers because they have to train themselves, and they do so in only a few cases. There is no sustained state effort to train teachers, and there is no initiative to get teachers posted throughout the Republic who know what they teach and how to teach. Our universities are not academic; they are disconnected from the problems and reality of Colombia (Bocanegra 2013, 131).

Lopez launched labor, agrarian, and education reforms, which were quite significant in Colombia. This marked a major reformist period when the social question was finally on the political agenda. In comparative perspective, however, the social reforms launched by Lopez were more limited than those in countries that experienced full-blown populism, such as Mexico and Argentina.

The Constitutional reform of 1936 reversed some, but not all, of the conservative economic, social, and education policies. It was a major step towards mass politics, since it guaranteed universal male suffrage. The state strengthened its capacity to intervene in the economy and to address the social problems of the poor. The reform also advanced the agenda of the Liberal party by guaranteeing freedom of religion, and excluding all references of Catholicism as the official religion (Bocanegra 2013, 135). The state provided education that was free of religious dogma; schools could no longer discriminate against students based on religion, race, or family origin. In reaction, the Church pursued legal actions against this reform, while priests gave sermons that condemned public school. This counter movement by the Church was effective in conservative departments, such as Antioquia, where Church pressure contributed to the closure of a number of public schools, and their replacement with parochial schools.

After 1934, access to public schooling increased, alongside education spending, compared to earlier periods. In 1934 education spending was 2.6% of state spending; by 1938 it reached 8.2% (Bocanegra 2013, 134). The ministry of education began to finance school cafeterias, since 20% of students went to school on an empty stomach (Bocanegra 2013, 134). President Eduardo Santos (1938-42) led a massive effort to build school infrastructure, investing in primary, secondary, and technical schools, as well as teacher colleges (i.e., normal schools) (Bocanegra 2013, 146). In response to a growing industrial sector and demand for educated workers, new national government agencies were formed in 1944 that distributed funds to municipalities to build schools, although results were modest (Bocanegra 2013, 148). As public schools expanded, private, parochial schools continued to operate. Indeed the growth of schools in the private sector outpaced public schools during the 1930s (Bocanegra 2013, 148). By 2006, Colombia had a large private school system; 73% of students were enrolled in public, while only 27% were in private (Pereyra N.D., 5).

Despite efforts to modernize and expand public education, the system remained underdeveloped. In 1936 a merit-based exam for entering the teaching profession and for moving up the salary scale was instituted, but few prospective teachers took this exam; there were high

rates of non-compliance.<sup>5</sup> Under President Lopez Pumarejo, teachers were also guaranteed a minimum wage (Bocanegra 2013, 142). A national teacher pay scale was set up, although it was difficult to enter, and its coverage was limited (Bocanegra 2013, 142). Between 1930 and 1945 teacher salaries were eroded by rising inflation, as they remained frozen in place (Bocanegra 2013, 148). Departmental governments continued to be responsible for paying teacher salaries (Bocanegra 2013, 137). Sharp difference between salaries across province and between rural and urban teachers remained in place. Efforts to expand public education still generated opposition from the Church, which defended parochial schools. High rates of turnover in the ministry of education throughout this period suggest that even during Liberal governments education was a low priority issue. Instead economic development and national defense received larger shares of the national budget (see also Ramirez and Telez 2006; Helg 1989).

The teacher labor movement was divided along multiple dimensions. First, there was both a public and a private school system. The public school system evolved differently across departments. Poor departments paid teachers irregularly, while wealthy departments had more functional public school systems. Moreover, urban teachers had more training and were more professional. They were more likely to be men who taught specialized courses at the secondary level, and in general had good salaries and benefits. By contrast, rural teachers had very little training and usually lacked credentials. They were more likely to be women and to teach at the elementary level, and they received a low salary and meager fringe benefits (if any). Finally, partisan identities divided teachers, since Liberals and Conservatives periodically took up arms against each other.<sup>6</sup> Each department had multiple unions. One was for primary school teachers and another for secondary school teachers; one was for Liberals and another for Conservatives (Interview Bogota, June 20, 2012). The divisions in the teacher movement during this period made it difficult to organize a union (Pulido 2007).

### Early Public Education, Late Teacher Movement in Argentina

In Argentina, governments addressed the education question long before dealing with the teacher question. The education system developed much earlier than it did in either Mexico or Colombia, and it achieved significant results in terms of eliminating illiteracy. Whereas Church-state conflict took place in Colombia and Mexico during the early 20<sup>th</sup> century, in Argentina this conflict took place in the late 19<sup>th</sup> century. President Domingo Sarmiento (1868-74) promoted public education, quadrupling education subsidies from the national government to the provinces, and increasing public school enrollment by 100,000 children (he even allowed women and girls to study). By the early 20<sup>th</sup> century, Argentina had one of the most developed public

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<sup>5</sup> In 1936 the first merit-based exam for teachers entering the profession and teacher promotion was set up, upon the recommendation of an Observatory Mission from Germany; however, conservative teachers abstained from this exam and objected to it (Bocanegra 2013, 138). Even though teachers were punished for non-participation by being fired, they were rehired later because of pressure from the teaching community.

<sup>6</sup> During the period of Colombia history known as *La Violencia* (the Violence), in which 300,000 Colombians were killed, teachers were targeted as well. Teachers with strong partisan identities were often victims of violence, and because education was highly politicized, schools were also targeted. Conservative governments accused teacher colleges of promoting Marxist ideologies (153). Conservative President Mariano Ospina (1946-50) restored parochial schools to religious communities – which had been previously taken over by the government. The Church attacked teachers from the pulpit, and teachers were systematically fired for being from the Liberal party after 1946.

school system and it achieved the highest literacy rates in Latin America (Engerman et al 2002). This school system was a response to the influx of European immigrants, early economic booms, and the declining influence of the Church. Argentina achieved a significant level of national wealth, emerging as one of the ten wealthiest countries in the world, which gave it resources for public schools. Yet public education suffered throughout the 20<sup>th</sup> century from cycles of economic boom and bust, and disruption caused by periodic military coups (Puiggros 2003).

In 1884, President Julio Argentino Roca (1880-86), who governed during a period of rapid economic expansion and a massive influx of European immigrants, pushed forward Law 1420, a landmark education, which enacted compulsory universal secular education. The national government subsidized provincial education but also constructed its own schools, which were called “Layneze” schools, nationally run schools that were based in the provinces. These schools were attractive of teachers because of their high salaries and good working conditions (Nardacchione 2010, 27). Political elites, such as Roca, challenged the Catholic Church earlier than in Mexico or Colombia. The weak linkages between the Church and the political elite limited the parochial school system (Tedesco 2003, Ch. 6). Argentina developed a public education system early on, which became highly developed, especially in the Buenos Aires metropolitan area.

While the public school system in Argentina developed earlier than in Colombia, there were similar practices of patronage and political interference. Parties strongly influenced how schools were staffed and which teachers were granted access to state benefits. Provincial governments regularly paid teacher salaries out late. For instance, in 1918 and 1919 teacher organizations in the provinces of Santa Fe and Mendoza organized strikes after teacher salaries were not paid out for eight months. These protests prompted a significant state crackdown.

The state’s strategy was drastic; firings, transfers of teachers, the creation of teacher federations with ties to the governing party, or denying legal recognition of teacher associations that were in the opposition (Nardacchione 2014, 8).

During the 1930s, governors in the provinces of Buenos Aires, San Juan, and Santa Fe created their own “parallel” teacher organizations, in order to coopt and control teachers (Gindin 2011, 101). In Argentina, a teacher statute was eventually passed in 1958 by a non-Peronist government that regulating entry into the teaching profession and provided tenure. These steps aimed to protect teachers hired by the federal government from political interference. This law also prompted provincial governments to establish labor codes for teachers, which helped to reduce patronage. Still, in less-developed provinces, such as la Rioja, the public sector exhibited patronage politics into the 1980s: schools had more teachers than students (Economist 1990).

The public-school system in Argentina remained highly fragmented. The Radical (UCR) government expanded secondary education in order to allow the middle classes to go into politics, but the changes in the structure of the overall education system were modest (Nardacchione 2010, 30). Both the federal government and the provincial governments had parallel systems of public education. Teachers hired by the federal government fell under one labor code, and those hired by the provincial governments fell under another (Gindin 2011, 104). Teachers were also divided by professional category. There were teachers with and without

credentials as well as primary, secondary, and technical school teachers (Nardachione 2015, 2). These divisions made it difficult to build solidarity within the teaching profession.

The Church's influence on public education remained weak, although it increased during the "infamous decade" of the 1930s. After the 1930 military coup against Hipolito Yrigoyen, the Church regained some influence, when the Church returned to Argentina and pressed for religion to be taught in public schools. The Church sponsored labor organizations that teachers were obligated to join, such as the staunchly anti-Communist Federation of Catholic Teachers and Professors founded in 1936. This organization, however, failed to sustain a mass-member base (Gindin 2011, 100). The Church continued to have influence during the Presidency of Juan Domingo Peron (1945-55), although the relationship deteriorated over time. While Peron instituted religious instruction in public schools, other subject areas remained independent of religious influence (Gindin 2011, 104). Tensions between the Church and the Peronist government increased over time, especially after religious education was annulled in 1954. Ultimately, the Church supported the military coup that ousted Peron.

Peron coopted unions and aligned them with his political agenda, while marginalizing leftist unions who resisted him. He controlled the labor movement by deciding which unions were given a *personeria gremial*, which prevented opposition unions from gaining state recognition. These laws made union affiliation automatic and obligatory. A provincially divided industrial labor movement rapidly became centralized in national labor confederations, namely the CGT (Gindin 2011, 103). In speeches, Peron distinguished between manual and intellectual laborers, creating separate union organizations for each. The manual sectors, which hailed from the lower classes, were larger and more loyal to Peron. In contrast, the more professional, intellectual workers hailed from the middle classes. The labor movement that Peron built utilized repressive measures to control dissent, while also rewarding loyalty.

Peronism successfully coopted industrial unions, but it failed to affiliate teachers. During the 1940s, there were numerous teacher organizations, most of which were aligned with the Socialist, Communist, and Radical parties. Peronists harshly repressed these unions, declaring them illegal and suspending their *personeria gremial* (Gindin 2011, 104). Teachers who did not affiliate with the Peronist party were laid off, like in Colombia (in Mexico non-PRI teachers were not hired in the first place) (Vazquez 2005, 9). The Peronists coopted traditional leaders of the teacher movement, including unions aligned with Catholic teachers, bringing them into the Peronist party. In 1953, the party sponsored a national teachers' labor organization, the Union of Argentine Teachers (UDA) (Gindin 2011, 107). Instead of having a *personeria gremial*, which required universal and compulsory union membership, UDA was awarded a different legal category, a *personeria profesional*, making it more of a professional association. UDA organized teachers and education administrators. There were other teachers' unions, organized at the provincial-level, which negotiated with provincial governments. Because these organizations operated at a lower tier, they were able to peacefully co-exist alongside UDA.

UDA failed to incorporate teachers en masse into its organization. In 1947, the Peronist government was unsuccessful in its efforts to advance a teacher statute that gave teachers labor rights but also automatically affiliated them to the Peronist party (Nardacchione 2014, 8; Gindin 2011, 102-5). The Peronists sought to control unions by delegating social welfare programs to

them (e.g. *obras sociales*) by suspending and persecuting militant union leaders (who resisted Peronism), and by forcing teachers to affiliate to the party. When Peron attempted to impose a teacher statute onto the union in 1947, teachers rejected this because it sought to coerce them into joining the ruling party.<sup>7</sup>

If in the labor world strategies of union cooptation were successful, in the education arena this was difficult, because teachers rejected efforts to coopt their unions (Nardacchione 2014, 8).

Heavy-handed Peronist efforts were unsuccessful. Teachers demanded political autonomy, invoking the Law 1420 as a means to protect themselves from political interference.

### *Teachers Construct National Organizations*

Beginning in the 1940s, teachers' unions began to establish national organizations throughout the region, albeit to different degrees. In country after country, unions organized different categories of teachers into a single grouping, equalized salaries across territory, and demanded a formal labor law for teachers. In many countries, unions sought to enact labor codes, career ladders, and credentialing requirements, in order to professionalize teachers and end patronage-based hiring practices. In others, unions took control over patronage practices, becoming gatekeepers that regulated access to various benefits. Teachers' unions demanded that the national government take responsibility for the teacher payroll, since it had more resources and paid teachers on time. Across countries, teachers' unions achieved contrasting degrees of nationalization of public school systems. On the eve of democratization, teachers' unions established different relationships to political parties, depending on how they were organized.

### A Hegemonic Party Promotes a National Union in Mexico

The ruling party in Mexico, the PRI, helped to promote a highly-centralized teachers' union. Building this centralized, national union was an incremental, slow-moving process. While President Lazaro Cardenas (1934-40) initiated the aggregation of teachers' unions, sponsoring unity congresses to facilitate dialogue among leaders from different unions, infighting among rivals continued and the teacher movement remained divided (Cook 1996, 62). With the PRI's support, the Mexican teachers' union finally established an encompassing, national organization during the 1940s. After union centralization, the PRI supported the purging of leftist factions, and the strengthening of a strong, pro-government group (Cook 1996, 61). The union had a high level of centralization by the 1950s, but incremental steps to further centralize the union also took place during the 1960s.

President Manuel Ávila Camacho (1940-46), who helped to institutionalize the PRI party and shift policy to the right, finished the work of centralizing SNTE (Collier and Collier 1991, 407-20). Both Cardenas and Camacho wanted to bolster SNTE and create a union that was loyal. Dialogue about union centralization had been ongoing for several years, and Avila Camacho

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<sup>7</sup> The landmark labor law, the Teacher Statute, was passed in 1958 after the Peron had been ousted via a military coup.



continued to sponsor the unity congresses that his predecessor had initiated. Initially, Avila Camacho's unity congresses also failed, especially after the heavy-handed methods of a conservative Minister of Education were unsuccessful. After this minister of education was removed and replaced, however, a unity pact was finally reached on December 30, 1943 (Cook 1996, 63). The national executive committees of three national teachers' unions, STERM, SUNTE and SMMTE, agreed to dissolve and form a single organization made up of teachers, technical workers, and administrative workers of the SEP.<sup>8</sup> This was a landmark step towards building what would become a highly-centralized union. The PRI's overarching agenda was to build a powerful, pro-government union, and then delegate responsibilities for governing the education sector to the leader of this union. The PRI saw the education system as a mechanism of political control.

The founding of the National Union of Education Workers (SNTE) laid the foundations for a centralized union. The project was to establish a single, dominant union that controlled teachers and overcame the historical fragmentation in the teacher movement (Arnaut 1998, 233). On January 13, 1944, the union received its legal recognition, gaining a *personalidad juridica*, which granted union leaders significant legal powers. The PRI sought to organize every group of workers into national, sectoral organizations in order to bring them into the ruling party. To this end, President Ávila Camacho provided SNTE with a monopoly of representation of education workers, making it the only legally sanctioned union. He ordered the secretary of finance to transfer 1% of the salary of every public-school teacher directly into the union's coffers (Ornelas 2008, 451). The 1946 Regulations of the General Work Conditions (*Reglamento de las Condiciones Generales de Trabajo*) centralized power in the union (Guevara Niebla 2012). Although the union statutes did not formally affiliate teachers to the PRI, the informal mechanism known as "*usos y costumbres*" institutionalized teacher affiliation to the PRI, since union leaders had an organic linkage to this party (Munoz correspondence December 5, 2016).

After the unification of multiple labor organizations, the first significant Secretary General of SNTE, Jesus Robles Martínez (1949-73) further centralized power. The union leadership supported the PRI and its presidential candidates, including Adolfo Ruiz Cortines in 1952, while restraining the demands of teachers. In return, the PRI supported Robles Martínez by giving him resources, which he used to contain opposition factions.

Robles Martínez blamed the poor conditions for teachers and problems in the union on the ideological conflicts that had been raging within the SNTE. He called for greater central control over union local governments in the states and put an end to the decision-making autonomy of locals and delegations, a holdover from the days when regional organizations were stronger than the center. The new leadership was also much more integrated into national politics and did not question its union's affiliation with or support for the government; involvement in the SNTE leadership came to be seen as a stepping stone on the way to political office (Cook 1996, 64).

During the 1960s, the union changed its statutes, setting strict seniority requirements that restricted access to senior leadership positions and strengthened the faction of Robles Martínez

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<sup>8</sup> <http://www.snte.org.mx/2015/secciones/1/quienes-somos>, accessed May 2, 2017.

(Gindin 2011, 202). The national leadership exhibited internal discipline, used its resources to promote loyal cadres, and prevented the infiltration of outside groups. The dominant leadership group crowded out opponents.

As the dominant group established itself, conflict in the union shifted from ideological differences to personal differences related to factional conflict in the PRI. Union leaders jockeyed for access to state resources, political positions, and other benefits they could distribute through their networks. Factional conflicts in SNTE's leadership revolved around loyalty to different factions of the PRI (Cook 1996, 66). Meanwhile, dissident groups, such as the Revolutionary Teachers' Movement (MRM) which had ties to the Communist party, were relegated to regional strongholds such as Mexico City. While leftist groups continued to compete in internal union elections, these elections took place on an uneven playing field since the dominant group had the PRI's backing. Leftist groups were never fully eradicated, but they were excluded from the national union leadership.

Throughout the 1960s a favorable economic climate, alongside an expanding public school system strengthened Robles Martinez. The union expanded dramatically; in 1949 it had 70,000 members, in 1964 it had 180,000 members, and by 1971 it reached 270,000 members (Gindin 2011, 202 citing Peláez 2000). Although Robles Martinez was not the official leader of the union, he was "the power behind the throne" (Cook 1996, 71). Union leaders obtained important positions in government through Robles Martinez. The union supported the Presidential candidacy of Gustavo Diaz Ordaz and it restrained protests after army snipers massacred between 30 and 300 university students during the 1968 Olympics in the infamous Tlatelolco Massacre. Close ties between the union and regime had been institutionalized by the 1960s.

The Federal Law of Service Workers of the State (*Ley Federal de los Trabajadores al Servicio del Estado*, or LFTSE) of 1963 further enhanced the union's power over teachers. This law granted union leaders discretionary control over the assignment of teaching positions (Guevara 2012; Rodriguez 2014, 38-39). The law created Mixed Commissions of the Teacher Career Scale, in which the union and the Secretariat of Public Education (SEP) each had 50% representation. In January of 1980, article 62 of the LFTSE was modified which enabled the union to select which teachers received promotions up the salary scale. Labor law codified the union as a partner in governing the education system. This law helped institutionalize a parallel and informal marketplace for teaching positions that was organized through the union. Teachers could buy, sell, and bequeath their salaried-teaching positions to other teachers or next of kin (Rodriguez 2014, 39). The union assigned half of teaching positions, both newly-created positions as the teacher payroll expanded as well as extant teaching positions that were vacated when a teacher retired or passed away. This law gave the union significant clientelistic control over rank and file teachers (Gindin 2011, 204).

However, Robles Martinez's hold on the union did not last forever. Over time, a new group of union leaders challenged him, and his control began to wane (Cook 1996, 70-3). In 1972, the Mexican President forced Robles Martinez to step down and replaced him with the President's own handpicked successor, Carlos Jonguitud (1972-89). He acted as a "moral leader" who exercised power over the national executive committee informally through his own,

personal base of power. Jonguitud invented authoritarian practices, building a more institutionalized and personalistic political machine, known as Revolutionary Vanguard. This organization became the institutional link that tied Jonguitud to the PRI, and it allowed to him to both increase his influence in the party and tighten his control on the union leadership. The union's centralized leadership was designed by the PRI, and it was also embedded in the party organization. The ties between SNTE and the PRI closely resemble the concept of union-party linkages; unions were connected to the populist party "through formal organizational links, interlocking leadership, or close coordination, as well as through a history of electoral mobilization and political socialization" (Collier and Handlin 2009, 49).

The legacy of SNTE's coming together and Robles Martinez's leadership left in place close ties between this union and the PRI. The union leadership accumulated significant resources to guarantee labor peace, discipline dissidents, and mobilize teachers as a voting bloc. The union had control over the daily lives of public school teachers. It distributed social benefits to teachers, helped them resolve labor problems, and influenced career advancement. By the 1970s, the ruling party promoted the union for explicitly electoral purposes and posted a large number of union leaders in the education bureaucracy.

Since the seventies and perhaps before, the union leadership used the resources and accumulated experience of the organization as a bargaining chip during elections in order to get different types of benefits, some of which were personal, others of which were for the whole union (Loyo 2008, 37-38).

SNTE accumulated resources and influence over teachers with the PRI's support.

The union became quite influential, and it also helped to centralize the public school system. SNTE demanded that teachers hired by the state and national governments have the same salaries, that the teacher pay scale give teachers more opportunities for promotions, that the teacher training system expand, and that professional categories fall under the same labor laws (Arnaut 1998, 233-4). After the PRI promoted SNTE's centralized organization, the union influenced the character of the public school system.

Prior to Mexico's protracted democratic transition, the PRI used the teachers' union as an instrument of political control. The union was part of the PRI's infrastructure, and it was used to control the teaching profession. The PRI empowered two union bosses, or *caciques*, who were responsible for demobilizing teacher protests by the remnants of the leftist groups that helped to initially build a strong teacher movement. These *caciques* prevented leftist parties from making incursions into the union. SNTE had two major *caciques* before Mexico's protracted democratic transition began to gain momentum: Jesus Robles Martinez and Carlos Jonguitud. Both of these leaders personalized power through national factions that monopolized control over union leadership positions. Jonguitud's faction, Revolutionary Vanguard, was a political juggernaut that institutionalized the linkage between the union and the PRI. The union facilitated the concentration of power in a single union leader. The national executive committee of the union was empowered by labor laws, but also informal norms of party membership. Both Robles Martinez and Jonguitud were staunch *PRIistas*, which gave them privileged access to the president, influence over patronage positions and other resources.

## Left Parties Organize a Teachers' Federation in Colombia

In Colombia small, leftist opposition parties brought the teachers' movement together. Teachers centralized a national organization, The Federation of Colombian Educators (FECODE), which challenged the entrenched patronage practices of the traditional parties. Union centralization was complete by 1979, when the union won a landmark teacher labor code. Previously, during the 1950s and 1960s, the traditional parties in Colombia prevented union leaders from obtaining power and resources. These parties sought to maintain weak and politically dependent unions while ignoring the festering problems in the education sector. The decision by the traditional parties to neglect teachers enabled left parties to make inroads and establish enduring ties to FECODE.

FECODE was founded in 1959 and received its legal registry in 1962. The founding of FECODE coincided with the establishment of the National Front regime (1958-74). Fatigue from nearly a decade of violence and disorder from 1948 to 1958, which included open partisan warfare that killed 200,000 people, pressured the two traditional parties to establish an elite pact, the National Front. This pact centered on power sharing. The two traditional parties agreed to *alternate* control over the presidency and to divide cabinet positions evenly in order to ease political strife. While partisan feuding declined, the regime represented oligarchic and traditional elites, while failing to represent lower class interests. The traditional parties remained in power through restrictions on electoral competition and clientelism (Dugas 1997, 84; Buitrago and Davila 1990; Hartlyn 1988; Eaton and Chambers-Ju 2014). Left parties were banned.

Teachers in Colombia mobilized against this exclusionary regime. The union formed in response to the clientelistic practices of traditional party bosses. FECODE was founded to address the late payment of teacher salaries and political interference in decisions to hire and fire teachers. In 1966 FECODE organized its first major demonstration, the *Hunger March*, in which a group of teachers marched 600 miles, from the coastal city of Santa Marta to Bogota, demanding that the president pay teacher salaries, since regional governments failed to pay them (Bocanegra 2013, 185-7). The *Hunger March* influenced public opinion, drawing attention to teachers' abject working conditions, while also creating a new system for funding education. President Carlos Lleras Restrepo acknowledged the entrenched problems of clientelism and dysfunction in the education sector. In 1968, he created special regional funds (FER), which were earmarked for education and addressed the grievances that teachers voiced during the *Hunger March* (Gomez and Losada 1984, 63; 211). The Hunger March, and the state's subsequent response to it showcased rivalries within the traditional parties. Reformist presidents wanted to modernize education while regional party bosses wanted to maintain patronage practices.

Teacher protests enjoyed widespread public support during this period. These protests targeted the late payment of salaries, the lack of a labor code, and the abusive practices of traditional politicians. Demand for public education was not keeping pace with education spending, which resulted in chronically underfunded public schools. Parents expressed solidarity with teachers during strikes. One union leader described how the parents of students supported teachers during this period:

We worked with the parents [of the students], we had the task of connecting the students to the school and organizing them. One task was to mobilize parents when the teachers went on strike. The parents were our collaborators and they participated in the marches, they helped us to finance the strikes. When we went two or three months without pay the parents would give us rice, sugar, and potatoes: this was great. Or they would invite us to eat at their homes (Interview Bogota, June 14, 2012).

Early protests raised awareness about the precarious working conditions of teachers. They articulated grassroots grievances and programmatic demands for policies to professionalize teachers. Unions aligned themselves against clientelism and the politicization of public schools.

When teachers started to mobilize in the 1960s, the union faced a hostile political environment. This was because the national labor code prohibited teacher protests. Governments declared protests illegal, cracked down by suspending FECODE's legal registry, and withheld salaries for the days teachers spent on strike (Pulido 2007, 32). Yet, FECODE proved resilient, and government repression prompted the union to develop its own organizational resources. Teachers organized mutual-aid societies and self-help groups, most notably teacher financial cooperatives, which organized strike funds. Teachers paid into these funds as a form of social insurance, so that when the government withheld the salaries of striking teachers, they had access to credit. By the 1970s, the union's self-help organizations became more institutionalized, and were recognized by the state. The union also became financial and organizationally stronger, after it started to automatically deduct union dues from teacher salaries (Gomez and Losada 1984, 208).

The obstacles that the exclusionary regime created for teachers representation set the stage for FECODE to align with small, left parties. Initially, FECODE had ties to the Liberal party. Adalberto Carvajal, who was a founding leader of FECODE and also a Liberal, served as President of FECODE from 1962 to 1970. Although he identified with one of the traditional parties, he was also a militant labor leader, who fearlessly organized a large number of strikes. Because teacher strikes were ruled illegal, Carvajal was detained and imprisoned on multiple occasions. However, Carvajal's militancy won him respect among teachers. He developed a cult of personality and began to concentrate power within the union. As a strongman, or *caudillo*, he was not unlike Jesus Robles Martinez in Mexico (Gomez and Losada 1984, 201-2). Carvajal centralized FECODE as a national union that mobilized its departmental affiliates.

Yet, the Liberal party prevented Carvajal from institutionalizing his control over the union. Carvajal was unable to secure political representation through the Liberal party, since he did not have strong relations with regional party bosses. In 1970, Carvajal built his own political party, the "Movement of Education Action" (MODAE), which tried to mobilize teachers as voters. This party ran lists of candidates in several departments. Yet, the electoral system, which aggregated votes in departmental districts, made it difficult for MODAE to win seats. Although Carvajal came within 83 votes of winning a seat in the lower house of Congress, his party only elected one departmental deputy and two city council members (Bocanegra 2009, 76-7). This electoral debacle weakened Carvajal's leadership profile. Whereas Robles Martinez became a power broker in the PRI, which helped him to build a hegemonic faction in the Mexican union,

the Liberal party's unwillingness to support Carvajal prevented him from consolidating a hegemonic faction in Colombia.

Carvajal, lacking a strong partisan ally, lost the Presidency of FECODE in the subsequent National Labor Congress of FECODE. An invigorated group of left parties took control over the union leadership. The union transitioned from leadership by a strongman to collective leadership by multiple, left parties (Gomez and Losada 1984, 211). In the VIII National Congress of FECODE, the "reformist" period of Adalberto Carvajal ended, and left leaders radicalized the union (Gomez and Losada 1984, 104; 212). Barred from participating in elections, some left groups took up arms; others joined social movements, such as the university student movement and the labor movement. University student leaders and left activists found refuge in FECODE and sought leadership positions in the union (Gomez and Losada 1984, 197). National union leaders were selected through labor congresses, in which left parties negotiated the division of positions in the union leadership. In 1968 the ten member national executive committee was made up of 7 liberals, 2 conservatives, and 1 independent. By 1973, in the IX National Congress, the national executive committee was made up of 2 Communists, 2 Maoists, 2 independent Liberals, 2 Marxist-Leninists, 1 Socialist, and 1 independent (Gomez and Losada 1984, 212-3). The union became an outspoken critic of the traditional parties.

While FECODE emerged as the largest teachers' union in Colombia, other teachers' unions challenged its claim as the sole representative of teachers until the 1970s. Left groups led a major unification effort which brought together the fragmented teacher movement. Initially, FECODE only organized primary school teachers. Left groups helped to fuse multiple unions together. Because these parties were hierarchical and highly centralized, their cadres cut across multiple teacher organizations. After left parties performed poorly in the 1974 election (the year the National Front ended), they banded together and built broad fronts (Gomez and Losada 1984, 214). Left unity contributed to the unification middle, secondary, and technical-school teachers as well as university instructors (i.e. ACPES, ANDEPET, ACEINEM, ANAMAC, ASPU, and FECOLPEM) (Gomez and Losada 1984, 202; 214-5). Left parties disbanded redundant, parallel unions and affiliated all teachers to FECODE. For example, Maoist co-partisans who were in multiple unions negotiated the dissolution of old unions, and the elimination of a large number of redundant leadership positions (Interview Bogota, Colombia July 22, 2009). FECODE became irreversibly centralized. Only university instructors (APSU) later broke from FECODE, and this was not surprising since professors and teachers operated under different labor codes.

During the 1970s, a political opportunity emerged for teachers to assert their demands. The National Front regime was unraveling. In 1971, the government opened negotiations on a national teacher labor code in response to growing unrest. FECODE organized major strikes throughout the 1970s, in order to increase its negotiating leverage. According to Gomez and Losada (1984, 9):

Between 1968 and 1978 there were at least 98 strikes by public school teachers; during the same period, workers in more than 6,000 industrial establishments organized only 287 strikes.

From 1972 to 1975, the union demanded the nationalization of education policy and the teacher payroll, in order to establish uniform standards. The first victory came in 1975, when the government passed Law 43, which made all teachers employees of the national government; the teacher payroll was nationalized (Bocanegra 2013, 204). The National Civic Strike, on September 14, 1977 resulted in a bloody crackdown, but prompted the government to respond to the social policy demands of workers. In 1979 the union won the Teachers' Statute (*Estatuto Docente*), a landmark labor law that set more national standards and further professionalized teachers. Teachers won a generous national labor code, which included a pay scale, pension benefits, social insurance, and tenure (Rodriguez 2002, 234-235; Bocanegra 2013, 203). These measures protected teachers from clientelism.

Legislative victories institutionalized the union and gave it access to new resources. Newly hired teachers were automatically affiliated to the union, union dues were automatically deducted, and FECODE became the only union that represented public school teachers. Indeed, teacher unionization rates in Colombia approached 100%. The *Teachers' Statute* made the union a policy taker, reinforcing FECODE's organizational machinery. This statute allowed teachers to exercise political rights and vote their conscience. Previously teachers lost their jobs when party turnover took place in departmental governments, and so teachers were compelled to vote for incumbents. With labor security, teachers were insulated from patronage politics. Labor laws, in addition to providing economic benefits, also had consequence for teachers as engaged citizens.

While the Colombian Federation of Teachers called itself a "federation," the nationalization of education policy effectively made it a national union (Bocanegra 2013, 216). The national executive committee had control over departmental unions, because of left party structures could impose discipline. Education policymaking took place at the national level, which also strengthened the national executive committee vis-à-vis departmental unions. Departmental union leaders sought to take a position in the national executive committee, which was regarded as highly prestigious. Colombia's departmental unions transferred 15% of union dues to FECODE's national executive committee; in Argentina, CTERA got only 10% of union dues (El Tiempo May 29, 2001).<sup>9</sup> Departmental unions did not protest decisions made by the national executive committee and withdraw from FECODE, in contrast to Argentina.

A legacy of FECODE's centralization through left parties was a factionalized union leadership. Left parties joined forces to build a national union, and these parties continued to hold influence. None of them established hegemony in the national executive committee. As a result, national labor congresses were contested and there was internal conflict over which group held power. This meant that instead of taking strategic action, the union had a more oppositional stance. Left parties jockeyed for power within the union, seeking to build on their established enclaves of support. The union, then, was riven by power struggles among competing groups.

#### A Divided Teacher Movement is Institutionalized in Argentina

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<sup>9</sup> Departmental unions almost never failed to transfer these resources to the national executive committee, unlike in Argentina. The only case of a departmental union refusing to transfer the full amount to the national executive committee was Cauca, which criticized national union leaders for taking overtime pay.

During the military government that ousted Peron in 1955, teacher frustration and mobilization ramped up. UDA's union registration was suspended and the teachers' statute was ignored (Murillo 1999, 42). In 1958 the Teacher Statute (Estatuto del Docente) was passed during the government of President Arturo Frondizi of the Radical party, and it covered teachers hired by the federal government. Before, this statute, teachers were referred to as "apostles," because of their low wages and lack of fringe benefits, the same term used in Colombia. This law granted teachers labor rights, a pay scale, and representation on councils of teacher evaluation and discipline. Of greatest significance, is the fact that this statute gave teachers *the freedom to join any union they wished*, which was a death knell for union centralization (Nardacchione 2014, 10). After this landmark labor law, fragmentation was baked into the teacher movement. Peronism failed to build a cohesive, national teacher movement. The teacher labor code that was enacted reinforced the divisions among teachers.

After Peronism failed to build a strong union that was incorporated into the party, the governing agenda involved neglecting education and making only incremental, piecemeal concessions to teachers when necessary. When teachers were aligned with left, opposition parties and the UCR, the goal of governments was to contain labor conflict, but to stay out of the teacher labor movement. Another possible explanation for the failure of the Peronism to incorporate teachers was the clout of industrial unions, which overshadowed teachers.

For teachers, movementism was the legacy of failed Peronist cooptation and the teacher statute of 1958. After the teacher statute, a number of autonomous provincial unions sprouted up, including CAMyP, FAGE, CCID, and UNE (Vazquez Balduzi 2010; Nardacchione 2014, 10-11). Professional teacher associations transformed themselves into labor unions, since the teacher statute reoriented union demands away from pedagogy and towards labor rights. The first national teacher strike, which was coordinated among multiple organizations, occurred in 1960. Although this strike did not sway policy, it articulated new demands, including salary and pension adjustments in line with the teacher statute.

During the 1960s the left began to make inroads into the teacher movement. There were two main confederations, CUDAG and CGERA, one of which resembled a professional association the other of which resembled a labor union. One had more influence in Buenos Aires, and the other in the interior provinces. During the labor congress of Cordoba (in November 1971) a new commission was created to promote a unity congress (Nardacchione 2014, 13). However, there was significant tension and conflict regarding the timetable and degree of unity. The first unity congress took place in Huerta Grande (Cordoba province) in August of 1973. The first step was a declaration of principles. Two points of agreement were "common, compulsory, free, scientific, and not dogmatic public education," and "the responsibility delegated only to the state." In addition, the union "would not admit any type of political activity by parties" in order to "guarantee the absolute separation of union activities from political activities" (Nardacchione 2014, 14). The second unity congress took place in the Federal Capital of Buenos Aires in September 1973, when 140 union organizations from across the country came together.

During the tumultuous 1960s, the union lacked access to government. This period was marked by periodic military rule, which contributed to the oppositional character of the teacher movement, and which did not augur well for centralization. Federalism of the education system



also contributed to fragmentation and gave rise to multiple organizations. The Argentine Teachers' Confederation organized itself from below, but was unable to establish an encompassing, national organization. The legacy of the teacher statute, multiple disruptions caused by military rule, and federalism produced a divided teacher labor movement. No strong union leaders centralized the labor movement.

*Conclusion: Union Organizations Prior to Democratization*

The historical origins of teachers' unions set the stage for the analysis of how teacher politics were transformed by democratization. This chapter has shown how Church-state conflict shaped the trajectory of public school systems and the development of unions. Teacher politics evolved significantly over the course of the 20<sup>th</sup> century. During industrialization in the 1930s and 1940s, teachers were fragmented and weak throughout the region. By the 1960s and 1970s teachers' unions coalesced and centralized national organizations. At this point, the Church's influence had waned, and mass systems of public education were institutionalized.

There are three takeaway points from this chapter. First, teachers were on a different path than industrial workers and engaged in politics in different ways. The experiences of industrial workers, which have anchored existing theories of labor politics, do not readily apply to teachers. The organizational characteristics of teachers' unions usually differed significantly from unions in the manufacturing sectors. In Colombia, the labor movement was weak and divided, by the 1970s the teachers' unions developed a relatively strong, national organization. By contrast, in Argentina, the labor movement was strong and centralized, the teacher movement remained fragmented and divided. Finally, in Mexico, the teachers' union did more closely resemble industrial unions, since both were centralized and affiliated to the PRI. Still, teachers in Mexico gained influence that other unions lacked, such as taking a fundamental role in education sector *governance*; by contrast, blue-collars unions were less prominent in industrial governance.

Second, teachers' unions were on different development trajectories in different countries. Mexican politics stand out for the stability of PRI rule. In this context, teachers developed an encompassing, national organization by the 1950s. A hegemonic leadership group was firmly established and it formed teachers into a voting bloc for the PRI. The union regularly endorsed PRI presidential candidates and union leaders entered public office. Meanwhile dissidents and left union leaders struggled to challenge the national leadership. Lacking access to state resources and facing legal obstacles they were relegated to regional enclaves. As a strong, centralized union, the Mexican union exerted growing influence on policy and accumulated a vast quantity of resources.

In Colombia, the teachers' union also established a national organization. The union developed in the context of hegemonic, traditional party rule, which transformed left parties into guerrilla organizations or pushed them into labor unions. For teachers, the legacy of left parties unifying a fragmented teacher movement left in place a factionalized union leadership that had multiple political allegiances. Even though union leaders had similar programmatic profiles, they hailed from rival parties that competed for voters. Operating under an exclusionary regime, the Colombian teachers' federation relied on protests to articulate its interest, since it faced barriers to participating in politics. From the opposition, FECODE successfully pressured the

government to respond to its demands, and it won landmark labor laws. The union's relationship to the regime resembled a sort of "oppositional corporatism," since by the 1970s, the union was not aligned with the ruling party yet the state recognized and subsidized it. Still the union continued to engage in contentious actions and voiced opposition to the regime.

In Argentina, teachers were only partially incorporated into the Peronist party, and they developed multiple partisan identities. Facing bouts of military rule, the teacher movement faced significant setbacks to its organizing efforts. In contrast to Mexico and Colombia, where teachers overcame organizational fragmentation, in Argentina rival unions were never disbanded. By the late 1970s the largest teachers' confederation had not been legally recognized. As a consequence, teachers were incorporated into multiple parties, and the teacher voting bloc was divided. Weak unions, such as the Argentina union, had more limited influence over policy, and had a difficult time accumulating resources and strengthening its organization.

Finally, due to these contrasting development trajectories, teachers' unions established different repertoires of political engagement. The Mexican teachers' union gained decades of experience mobilizing teachers as voters, and it had an organic link to the ruling party. The teachers' union in Colombia was independent from electoral politics, falling under the influence of left parties that were barred from participating in elections. However, because of its powerful organization, the union had latent electoral potential that had not yet been realized. In Argentina, the teachers' movement was contentious and politically divided, since repression by military regimes retarded its development and restricted its political participation. This meant that prior to the 1980s, Argentine teachers had different organizational characteristics and different relationships to political parties.

### Chapter 3: Instrumentalism in Mexico

I argue that the different political strategies teachers' unions adopt following democratic transitions is the product of two factors: (1) organizational centralization and (2) leadership cohesion. In Mexico, the National Educational Workers Union (SNTE) demonstrates this argument by illuminating how a union gained top-down control over its members, and how a hegemonic faction monopolized power over the leadership. The cohesion of the leadership and the elimination of rival power centers gave the union the capacity to take strategic actions. The union launched its own, independent teacher-based party and negotiated instrumental alliances with multiple parties.

SNTE was distinctive because it was highly structured and subsidized by the state, which gave it control over rank and file teachers. Teacher incorporation into politics started when the union was founded in 1943, shortly after industrial labor unions in Mexico were incorporated into politics. Teachers were brought into the Institutional Party of the Revolution (PRI) through SNTE. The PRI promoted the teachers' union with labor laws, which strengthened the union's organization and cemented the loyalty of its leadership, at least until the 2000s. The PRI built up the teachers' union in order to prevent left parties from making incursions into the teacher movement.

After 1989, the PRI adopted a new set of pro-union education policies and the union received additional subsidies in order to strengthen the official leadership and demobilize the dissident movement. While the dissident movement surged during the 1980s, in the 1990s the PRI adopted new measures to regain control over the teacher movement. The ruling party promoted the union by granting the union influence over a number of social welfare programs and governance functions, including the distribution of social welfare benefits and opportunities for career advancement. The union not only demobilized dissident groups, it also formed a powerful voting bloc.

The union leadership was organized into a single, hegemonic faction. After 1989, a new group of union leaders established control over the national executive committee and in state-level union locals as well. This group expanded its influence because it decided which new union leaders would be selected. It promoted loyal cadres while it limited the ability of rival factions to win positions in the union leadership. Moreover, electoral rules created incentives for the leadership group to stay together. These rules constrained political representation, giving union leaders the option of either staying with the PRI or coordinating on a new, teacher-based party.

Efforts by the PRI during the 1990s to cement the union's political loyalty through subsidies backfired in an ironic way. The hierarchical organization of the leadership enabled SNTE to strategically negotiate partisan alliances. By giving SNTE its own resource base, the union gained the capacity to act strategically, separating from its longstanding partisan ally. In 2005, union leaders launched, *New Alliance*, a political party that expressed the interests of the teachers' union. After 2000, when the PRI lost the presidency, the dominant faction of SNTE negotiated short-term, instrumental alliances with presidents and governors from all parties. Because of SNTE's organizational and leadership structure, the union forged alliances with ideologically incompatible parties across tiers of government.

This chapter is organized chronologically in order to analyze the evolution of teacher mobilization. The first section, “Growing Challenges of the 1980s” examines the emergence of a dissident movement that protested against the authoritarian practices of the union boss Carlos Jonguitud, ultimately forcing him to step down. The next section, “Rebuilding the Union in Response to Dissident Mobilization,” examines how the PRI strengthened the teachers’ union in order to prevent further teacher unrest. It shows how the new union leadership, headed by Elba Esther Gordillo, accumulated new resources and asserted control over the member base. “Consolidating the Union Leadership” shows how the national union leadership weakened rivals and gained undisputed control over the union. “Ramping Up Electoral Mobilization” explains how the union’s robust organization enabled it to become an essential component of the PRI’s political machinery and to play a growing role in electoral mobilization. “The Turn to Instrumentalism” shows how the union established diversified alliances with multiple parties. The conclusion summarizes the key steps in the argument.

### *Growing Challenges of the 1980s*

The teachers’ union experienced disruptive changes as Mexico endured the debt crisis and began a protracted transition to democracy, which started in 1977 and concluded in 2000. A dissident movement that resisted the official union leadership gained ground during the 1980s (Foweraker 1993; Cook 1996). By 1989, SNTE’s official leadership had lost control over a large swath of rank and file teachers. The union had various organizational mechanisms to prevent protests by dissidents, namely control over career advancement and social welfare benefits. However, these mechanisms proved ineffective during the debt crisis, when teacher wages stagnated, labor grievances accumulated, and the union proved incapable of coopting the dissidents. The tumultuous uprising of the dissident movement made a transformation of the union appear inevitable.

The teachers’ union lost control over the teaching profession. The union boss Carlos Jonguitud encountered technocrats who wanted to eliminate patronage in the education bureaucracy, which had allowed union leaders to achieve high-ranking positions in the Secretariat of Education (SEP). Between 1976 and 1982, technocratic reformers excised bureaucrats loyal to Jonguitud from the education bureaucracy (Cook 1996, 82-96). These reformers took steps to modernize the education system, and to end traditional practices. Technocrats challenged the union, creating a crack through which teacher dissent emerged.

The national leadership’s weakening control over the education bureaucracy prompted the emergence of the dissident movement. Dissident teachers challenged the official union leadership by giving voice to economic grievances. During the early 1980s, President Miguel de la Madrid imposed harsh austerity measures onto the education sector. Teacher salaries stagnated and in some years they declined significantly. While teacher wages declined, union leaders continued to enjoy access to plum patronage positions. The growing inequality in the economic conditions of union leaders and rank and file teachers contributed to growing discontent. According to one ex-union leader (Interview Mexico City March 25, 2012):

After 1982 teacher salaries and bonuses fell and they were only a little bit more than the minimum wage... the union leadership [of Jonguitud] was more worried about getting political positions, and it neglected the issue of teacher salaries.

While bread-and-butter issues were the primary motivation for dissident protests, teachers also demanded political rights. The union used heavy-handed methods to induce teachers to vote for the PRI; since teachers were automatically affiliated to the PRI, they were compelled to vote for the party. Corrupt union practices also violated the political rights of teachers. Teachers accused union leaders of embezzling union dues, which leaders used to finance their lavish consumption habits. Male union leaders used their positions of privilege to harass and take advantage of female teachers. There were numerous reports of union leaders loyal to Carlos Jonguitud demanding sexual favors from female teachers in exchange for assistance resolving labor related problems. Teachers lacked legal recourse to counter this corruption and abuse and they demanded political rights.

Efforts by the union to repress and restrain teacher demands prompted redoubled dissident mobilization (Foweraker 1993; Cook 1996, 19). As the union leadership cracked down on the dissidents, cycles of regional protests that were coordinated across states spiraled out of control. In 1981, the assassination of Misael Núñez Acosta, a dissident union leader, who was targeted by the official union leadership prompted a solidarity protest involving dissident groups in multiple states. Over the course of the 1980s, the leadership was incapable of demobilizing these dissidents. The dissidents expanded their influence, gaining ground in the states of Oaxaca, Guerrero, Michoacán, Mexico, Morelos, and Hidalgo, as well as in the Federal District, Mexico City.

The dissident movement enjoyed broad public support. Demonstrations by ordinary teachers who marched from the southern states to the capital engendered public sympathy, especially because of the harsh austerity measures that teachers endured. Moreover, teachers symbolized the broader struggle of ordinary citizens against rule by old-style PRI political bosses, as activist teachers publicized the corrupt and abusive practices of the union leadership. Jonguitud was put on the defensive, and one-by-one Jonguitud's regional allies began to fall to the dissident movement. Dissident teachers claimed the mantle of democratic protesters that demanded reform to a corrupt union. They also drew attention to longstanding problems of inadequate funding in the public school system, which the regime had neglected during the 1980s.

Protests by dissidents eventually achieved the goal of removing Jonguitud. Because Jonguitud's group was unable to restrain teacher protests, it became increasingly less useful to the PRI. Teacher protests became brazen and they threatened governability (Cook 1996, 316-9). Protests reached their peak in April 1989, when half a million teachers mobilized against Jonguitud. Fearing that teacher unrest might pose a serious threat to the regime, President Carlos Salinas removed Jonguitud and replaced him with Elba Esther Gordillo (Cook 1996, 270). Salinas miscalculated that Gordillo was a weak leader who would be easy for him to control. Dissident teachers won a major victory, by exerting pressure from below. The dissident group seemed positioned to make the union more internally democratic and to transform the patronage-ridden education system.

### *Rebuilding the Union in Response to Dissident Mobilization*

While mobilization from below led to the removal of Carlos Jonguitud, it ultimately failed to change the hierarchical and undemocratic structure of the union. Instead of prompting reform, it generated a counter-reaction by the PRI to shore up the official leadership. In direct response to dissident mobilization, during the 1990s the PRI embraced a new set of policies to strengthen the Mexican teachers' union. After the debt crisis, the union re-established control over its member base. A new set of policies rehabilitated the union's organizational structure and expanded the services that it provided to rank-and-file teachers. The union reasserted its outsized role in teachers' daily lives by helping teachers solve problems in the workplace, advance careers, and access social welfare benefits. As the union regained control over rank and file teachers, it demobilized dissident groups. Because of pro-union policies, the dissidents never again showed the strength they exhibited during the 1980s.

To regain control over teachers, the PRI enacted policies that addressed teachers' labor grievances. The new union leader, Elba Esther Gordillo, used her close ties to President Salinas to successfully negotiate increases in teacher wages (Cook 1996, 274). As Figure 1 shows, teacher salaries declined during the 1980s, due to the debt crisis and harsh austerity measures on education budgets. However, teacher wages recovered during the 1990s and continued to rise during the 2000s, making significant gains against the minimum wage.<sup>10</sup> As the economy recovered, the union successfully represented teachers' interests. In this environment, it was difficult for dissident groups to sustain support: "a strong economy and significant annual wage increases for teachers between 1989 and 1991 reduced discontent among the dissidents" (Hecock 2014, 67). Restoring teacher wages was the first step for demobilizing dissidents.

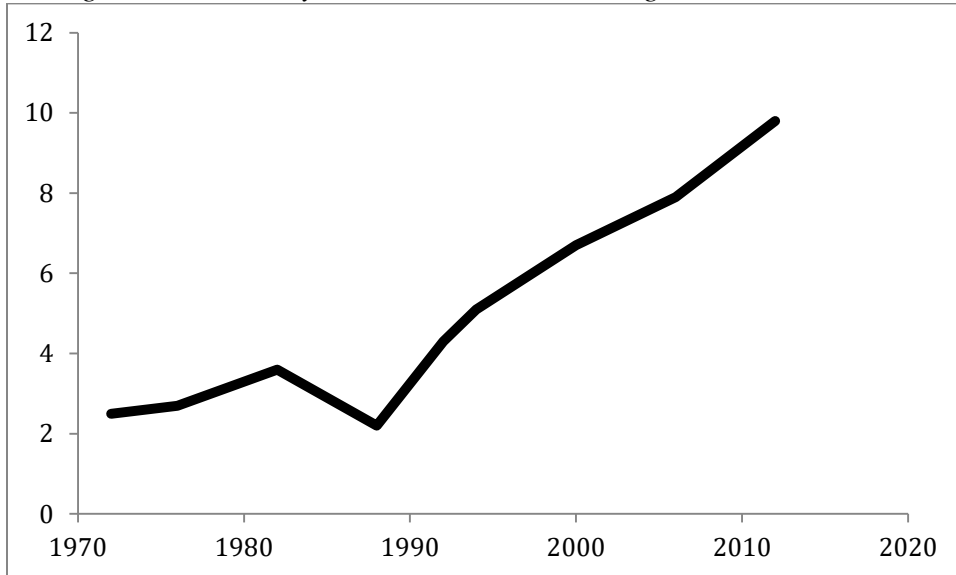
Improvements in teacher wages also strengthened the union's financial outlook, since the state automatically transferred 1% of every teacher's salary into the union's coffers. The PRI improved teacher wages in order to strengthen the resource base of the official union leadership.

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<sup>10</sup> For data on teacher salaries, see (<http://www.wenceslao.com.mx/snte32/salarios.htm>).

**Figure 1**

*Average Teacher Salary Relative to Minimum Wage*



Sources: Fernandez 2012

In addition to restoring teacher wages, the PRI also promoted the SNTE's organizational machinery in several more direct ways. The PRI rebuilt the union by distributing benefits through the union, and teachers' derived multiple advantages from being union members. The union and the education bureaucracy co-governed the public school system, jointly making personnel decisions. This gave the union a central role in advancing the careers of teachers. In addition, the union had control over a vast array of social welfare benefits, which it used as selective incentives to mobilize teachers. The PRI thus promoted the union in three different ways: (I) giving the union greater influence over teacher career advancement; (II) giving the union a greater role in the distribution of social welfare benefits, and (III) expanding the size of the union staff.

### Influencing Career Advancement

During the 1990s, the union made new incursions into the Secretariat of Public Education (SEP). Efforts during the prior decade to purge union loyalists from the SEP ended once the new leadership took the reins in 1989. Union leaders re-established their influence over the education bureaucracy. After the 1992 decentralization reform, which gave governors authority to select state-level Secretariats of Education, the union pressured state-level officials for patronage positions in the education bureaucracy. Indeed, Elba Esther Gordillo negotiated with governors throughout Mexico, and she decided which positions in the state-level Secretariat of Education union leaders would occupy (Cano and Aguirre 2013). As a result, union leaders and union allies occupied top leadership positions in many of the state-level SEPs. By holding these positions union leaders influenced education policy design and implementation, thereby ensuring pro-union education policies.

Even when the union did not control high-ranking positions in the education bureaucracy, there was another system through which the union co-governed the education sector. “Mixed-commissions” composed of both union representatives and education bureaucrats made personnel decisions. Their mandate was to keep schools fully staffed. These commissions were responsible for transferring teachers between schools, recruiting teachers-in-training (*interinos*) out of teacher colleges (e.g. normal schools) and into permanent positions, and granting teachers permission to take a leave of absence in order to allow temporary substitutes to replace them. These commissions also decided which teachers received promotions, either up the salary scale or to administrative positions such as school principals and district supervisors. Union leaders used their influence over administrative decisions to pressure teachers to follow union directives.

Career advancement could also be set back by administrative dysfunction in the bureaucracy. Because the union had influence in the SEP, it could also withhold benefits from teachers, preventing career advancement and prolonging the resolution of administrative problems (Rodriguez 2014, 138). The education bureaucracy in Mexico, in which patronage politics featured prominently, sets it in sharp contrast to the proto-typical Weberian bureaucracy. Indeed, administrative dysfunction made teachers more dependent on the union. Political patronage was the norm, and teachers understood that in order to solve problems and advance their careers, they needed to demonstrate their loyalty to the union. In addition to carrots, the union also used sticks to punish teachers for disloyalty.

One particularly important function that the union played was to help teachers-in-training to land permanent teaching positions. The Federal Law of Public Service Workers (LFTSE) granted public sector unions, which included teachers, Social Security workers, and oil workers, influence over the distribution of 50% of newly created positions. Teachers started their careers holding temporary positions as *interinos*. The union helped many of them to get permanent positions that put them on the official teacher payroll. New teaching positions were scarce, especially those that were in desirable urban areas. This enabled the union to help create a system for allocating teaching positions. There was a longstanding norm whereby retiring teachers could bequeath their teaching position to their next of kin. This meant that some teachers inherited their positions from an elderly relative. However, retiring teachers also “sold” their full-time teaching position (*plaza*) to a non-relative. State-level union sections organized informal marketplaces for teaching positions, in which union leaders linked buyers and sellers, while they took a cut of the sale (Jordan 2004; del Valle 2008).<sup>11</sup> The union’s control over this marketplace enabled union leaders to regulate who entered the teaching profession, which was a powerful mechanism of political control. According to one union adviser (Interview Mexico City, Mexico, March 9, 2012):

The main method of control is through the assignment of teaching positions (plazas), which is to say when someone wants to retire and someone wants to inherit their position – that is where the union is in control.

While many of these mechanisms of political control, such as mixed commissions, had been in place for decades, the union also gained new patronage resources. As a concession for

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<sup>11</sup> See Sonia del Valle, “Reproachan a SNTE manejo de plazas,” *Reforma*, February 19, 2008.



accepting the 1992 decentralization reform, the union gained influence over a program for allocating bonuses to teachers, *Carrera Magisterial*. Formally this program was designed to pay teachers a bonus based on their professional merit and effectiveness in the classroom; in reality, however, this program was politicized and became another way the union sustained networks of political patronage. These bonuses were large and permanent. Teachers who achieved the first level received almost 25% more than the base salary for teachers; those who reached highest level earned nearly 300% more (McEwan and Santibáñez 2005; Ortiz Jiménez 2003). This program was governed by “mixed-commissions” composed of half union leaders and half officials from the SEP. In several states, union leaders rewarded teachers with promotions up the salary scale in exchange for their political loyalty or they punished teachers from the dissident group by excluding them from benefits (Hecock 2014; Rodriguez 2014, 112). This program was transformed into a new mechanism by which the union reinforced its control over rank and file teachers.

### Distributing Social Welfare Benefits

The Mexican teachers’ union provided a number of social welfare and mutual aid benefits to teachers. The PRI strengthened the union by delegating service provision functions to the union. Indeed, the Mexican teachers’ union rivaled “transmission belt” unions in the former Soviet bloc in terms of the services it provided to its members. In former Communist countries, labor unions provided a number of services to their members (e.g. summer camps, vacation facilities, and emergency credit), inherited a number of large assets (e.g. office buildings, print houses, banks, cultural institutions, resorts, and hotels), and they managed social welfare benefits (e.g. social insurance funds, pensions, unemployment benefits, and health funds) (Caraway 2012, 281-82). The same was true in Mexico, where one observer suggested that the Mexican teachers’ union bore an uncanny resemblance to labor unions in the former Soviet Union, in terms of organizational centralization and the provision of services (Interview Mexico City, August 20, 2012).

The Mexican teachers’ union managed numerous social welfare benefits for teachers. These included, among other services, hotels, vacation resorts, and recreational facilities (e.g. *La Operadora de Centros Recreativos de los Trabajadores de la Educación*).<sup>12</sup> In addition the union was responsible for managing the teacher pension fund for retirement (e.g. *Fondo de Retiro para los Trabajadores de la Secretaría de Educación Pública, FORTE*), which was created in 1990. The union also created its own credit union (e.g. *Caja Magisterial de Ahorros y Préstamos*), which provided credit for teachers to get various financial services, including car loans, among others. The union claimed credit for its prominent role in distributing a variety of different benefits to teachers. This type of service provision was not uncommon among corporatist labor unions. However, the array of services that the Mexican teachers’ union provided to its members was especially large and significant.

In addition, the union provided a number of social welfare services that became politicized. Two are important to highlight: the health services fund and the affordable housing

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<sup>12</sup> Nurit Martinez. “El SNTE tiene su paraíso.” *El Universal* May 20, 2009.

fund. One union adviser said that the union's control over housing benefits was "coercive" (Interview March 9, 2012): "they say if you are not with us, we won't give you housing loan, you will lose benefits if you are not with us." Rodriguez (2014, 102) also mentioned this practice. In the state of Nayarit the union used the social security institute for state workers (ISSSTE) and its home loan program (FOVISSSTE) as mechanisms of political control.

The worker can go to the delegation of the Institute of Security and Social Services of Public Employees (ISSSTE) to request a loan, or the Housing Fund of the Institute of Security and Social Services of Public Employees (FOVISSSTE), for a mortgage for a home, but if that is how he or she does it, he or she can find different problems that slow down or deny the transaction. Dissidents can encounter denials, no matter how they request the loan. Nevertheless the most effective way to obtain a transaction is through friends, in SNTE or in the agencies in charge of making these transactions, with personal relationships; the political position of the person making the request matters.

In sum, the teachers' union provided social welfare services directly to teachers and helped them to solve bread-and-butter type problems. The union's influence over the daily lives of rank and file members was significant, and it enabled the union to undermine the dissident movement while also forming teachers into a captive voting bloc.

#### Expanding the Union Staff

In addition to delegating new services to the union, the PRI also strengthened the union's organization by expanding the size of the union staff that was authorized to work for the union. One way that the state subsidized the union was by authorizing the union to "commission" teachers. Labor Laws enabled teachers to request a leave of absence from their classroom duties, which could be temporary or indefinite, in order to work for the union. Officially, these teachers were supposed to do administrative work for the union, or supplemental pedagogical work to support classroom teachers. In practice, however, many of them carried out political work for the union (Fernandez 2012, 307). During the 1990s, as the PRI's hold on power was threatened, regional electoral brokers in the PRI expanded the number of full time union staffers, since they were almost all PRI loyalists. After there were new institutional protections that made blatant electoral fraud more difficult to carry out, the PRI began to bolster the teachers' union in order to strengthen its electoral machinery.

Commissioned teachers remained on the payroll, meaning the state paid the salaries of a large number of union staffers and union leaders who were dedicated full time to working for the union. As such, a stunningly large number of union organizers and staff who took a leave of absence to work in the union headquarters. In 2012, the government implemented a teacher census, which aimed to identify "ghost" teachers who were on the teacher payroll but who were chronically absent from their work in the classroom. It found that there were 2,863 teachers who were authorized to work for the union. However, this number is only scratching the surface. The union also used its own resources to hire union staffers, since SNTE had its own payroll as well. Commissioned teachers, alongside the formal structure of the union leadership, constituted the union's electoral machinery. According to Miguel Alonso Raya, an ex-leader of SNTE, there were as many as 50,000 union activists who constituted the union's electoral machinery—"the

political class of the union sections” (Raphael 2007, 167 & 186). The union was a massive operation that was extremely well staffed and could deploy a substantial number of boots on the ground.

State subsidies also financed a number of other para-union organizations, which constituted the union’s associational network. In addition to the formal union structure, there were also a number of voluntary associations, such as women’s groups, cultural interest groups, and recreational clubs, which strengthened the union’s presence in the lives of teachers. The state also financed private economic enterprises that had ties to the union. These included businesses that provided schools with lunches and snacks, textbooks, and pedagogical materials (Interview Union Leader August 9, 2012). In addition to the union’s formal organization, there were also a number of secondary organizations that had strong links to the union. This network of organizations surrounded teachers, and gave the union a prominent role in their daily lives.

The union’s large staff and leadership structure organized teachers across territory. The union had massive reach, and maintained regular contact even with remote rural schools. According to Raphael (2007, 166): “perhaps only large companies such as Coca-Cola and the bread distributor Bimbo reached the far-flung places where SNTE was present.” One consultant who worked for the union said that in the state of Hidalgo, the union local had a fleet of over 400 vehicles, including cars, SUVs, trucks, and motorcycles, which gave it unparalleled access to the most remote parts of that state (Interview Mexico City, April 17, 2012). The private vehicles ordinary teachers used to get to school augmented this fleet. The union staff was able to deploy itself across territory and reach difficult to access areas.

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The PRI’s decisions to rebuild the union after 1989 contributed to a massive decline in teacher protests. States where the dissidents had formerly been strong, Chiapas, Morelos, Valle de Mexico, Hidalgo, and Mexico City, exhibited a dramatic downturn in contentious mobilization, and dissident groups declined significantly in these states (Tapia 2013). Labor relations between the union and state governments became peaceful and cooperative. Indeed state governments formed alliances with the teachers’ union because the new union leadership pledged to pacify restive teachers. By 1995, the assortment of tools that the union leadership gained brought about a return to quiescence. Protests became sporadic, relegated to a single state.

The decline in the number of protests that teachers organized also stemmed from the superiority of other modes of political influence. The dissident groups had a difficult time claiming credit for delivering concrete benefits to teachers. One high-ranking union leader described protest as producing more costs than benefits: “[Protest] didn’t generate [positive] results from the government and it led to administrative and even violent repression” (Interview Mexico City March 9, 2012). Indeed, throughout the debt crisis, teacher protests produced little in the way of immediate relief from austerity policies. Meanwhile, the national union leadership, which embraced non-disruptive modes of influence, claimed credit for delivering consistent improvements in teacher salaries and fringe benefits. As a result, teacher strikes declined and they were overshadowed by the union’s growing involvement in electoral politics.

### *Consolidating the Union Leadership*

After Carlos Jonguitud was forced to step down, Elba Esther Gordillo was initially in a weak position because she faced rival groups (Cook 1996, Ch. 7). The union leadership was divided three ways: one group was loyal to Gordillo; another remained loyal to the old union leader, Jonguitud; and a third dissident group rejected both the old and the new leaders. While Gordillo faced rival union leaders, she was a shrewd political operator who skillfully consolidated power. Gordillo developed her own dominant faction, which became known as the “hegemonic” or “institutional” group. It was extremely hierarchical. The brains were located at the top of the organization, and subordinates served as political operatives who carried out orders. One Federal Deputy who was also a union leader said (Interview Mexico City February 20, 2012):

In my opinion the union culture is very backward, there is a lot of inertia and [lower level] union leaders don't express what they really believe, people are always waiting for clues, or instructions [from above]. They are very disciplined and they expect to advance... [by] shutting up and marching on.

Leaders under Gordillo followed orders, and in exchange they took their salaries. They obeyed union directives, without making their own proposals or raising points of discussion, even when their subservience frustrated the union leader, who felt that cronyism had gone too far (Interview August 14, 2012). Ultimately, Gordillo established hierarchical control over the entire leadership structure; no rival leaders presented a serious challenge.

Multiple factors contributed to the consolidation of power in the union leadership. Historical legacies related to Mexican corporatism explain some of this power concentration. The backing of President Salinas also played an important role, at least initially, since it enabled Gordillo to claim credit for delivering concrete benefits to teachers. However, four initiatives enabled Gordillo to concentrate power: (a) establishing undemocratic procedures for selecting union leaders; (b) manipulating union statutes, (c) coopting rivals and cementing loyalty; and (d) new electoral rules that incentivized union cohesion.

#### Selecting Union Leaders

The first method that Gordillo used to concentration of power was to use undemocratic procedures for selecting new union leaders. Union elections never took place on an even playing field. Gordillo's group always had an advantage in terms of financial resources and organization. Union leaders were selected in national and regional labor congresses, not direct elections in which rank and file teachers cast a vote for the union leader of their choosing: such elections were more difficult to control. Labor congresses enabled the hegemonic leadership group to maintain its dominance and to reproduce itself in power. They provided no points of access for rival groups to compete.

In 1995, Gordillo had not yet consolidated power. Union statutes, at the time, mandated that she step down after completing her term and allow a successor to take the reins of the union. In 1995, Humberto Davila was the unity candidate that replaced Gordillo as the Secretary

General of SNTE. However, as a condition for stepping down, Gordillo negotiated influential positions for two of her loyalists. For instance, her ex-husband Francisco Arriola was the finance secretary and Rafael Ochoa was the secretary of organization (Raphael 2007, 171). Arriola continued to manage the union's complex financial interests in accordance with Gordillo's interests; meanwhile, as Secretary of Organization, Ochoa packed union locals with leaders who were aligned with Gordillo.

Humberto Davila thought, wrongly, that he could gain control over the union and extricate Gordillo's influence by forming an alliance with then President Ernesto Zedillo. Davila never stood a chance. In the labor congress of 1998, backed by the union's financial resources (Arriola) and by a capable operator in the Secretary of Organization (Ochoa) Gordillo rallied teachers across Mexico to support her preferred candidate. Tomas Vazquez, who won 1,926 votes in this congress. The allies of Davila won less than a third of this amount (Raphael 2007, 177). This was the last challenge to Gordillo's control over SNTE's leadership. After Davila lost power, no other rivals posed a significant threat.

Once established, the national leadership intervened in state-level union locals to reward leaders allied with her and to punish rivals. Gordillo eliminated regional rivals who were loyal to Carlos Jonguitud by promoting her own cadres in regional labor congresses (*convocatoria de congreso seccional*). She deployed resources from the national union coffers in order to benefit allies. In cases where rival groups were deeply entrenched, and spending large sums of money would not remove them, Gordillo adopted other strategies. She channeled union resources to dissident groups, in order to pressure embattled regional union bosses. In the states of Michoacan and Hidalgo, dissidents, who had Gordillo's backing, ran rival regional bosses out of power.

The national union leadership carefully monitored regional labor congresses. Gordillo helped her allies by sending her emissaries (*los enviados*) from the national executive committee to the states, especially those where the dissidents were strong. *Los enviados* were veteran union organizers, who promoted regional allies or negotiated with the dissidents. By sending out these allies, Gordillo projected power across territory, especially into the restive southern states. A high-level union adviser said that unfair procedures for selecting union leaders were part of the union leadership's strategy: "They were intended to prevent the intervention of outside political actors into the union" (Interview October 8, 2012). While regional party bosses attempted to insert themselves into the union, Gordillo was vigilant against such incursions. Gordillo rigged union labor congresses to reproduce the power of the dominant group.

### Manipulating Union Statutes

Another way that Gordillo consolidated power was by manipulating union statutes. When Gordillo first came to power, she made cosmetic reforms to union statutes, in order to create the appearance of union democracy. Gordillo ended the authoritarian and predatory practices of Carlos Jonguitud, which were widely regarded as significant and progressive changes. These included: (a) guaranteeing teachers "freedom of partisanship" (*libertad de militancia*) and ending the automatic affiliation to the PRI, (b) recruiting women into leadership positions, (c) ending sexual harassment and abuse by union leaders, (d) allowing dissidents to get some representation in the national executive committee, and (e) disbanding *Revolution Vanguard*, the abusive

faction led by Carlos Jonguitud (Cook 1996, Ch. 7). During the 1990s, Gordillo also pushed to democratize party primaries within the PRI, and to open national labor confederation (Samstad 2003, 13). These reforms helped Gordillo win legitimacy. She established connections with leading Mexican intellectuals, who regarded her as a reformist, democratic leader.

However, changes to union statutes were superficial. They did not hinder Gordillo's efforts to consolidate power. She continued to coopt opponents and to exclude rivals. Alongside these democratic reforms, Gordillo developed informal mechanisms of control. The union's internal operations remained shrouded in secrecy, as corrupt practices involving the union's finances continued. While Gordillo avoided the overt predatory behavior of Jonguitud, she built a hegemonic faction that was similar in its discipline and vast influence. Gordillo's true colors became visible over time. Initially, she claimed credit for embracing a reformist agenda, while she obscured her political ambitions.

Over time Gordillo abolished union statutes that imposed checks on her power. She abolished the term limits that most political organizations in Mexico established in order to prevent leaders from personalizing power. Initially, Gordillo kept term limits in place, and used her informal influence to serve as the power behind the throne. However, by 2004, she no longer needed to maintain the trappings of union democracy. She created a new position for herself, the union president, which was exempt from term limits. The union president superseded the Secretary General, who Gordillo feared might turn against her and become a potential rival. After consolidating power, Gordillo changed the rules of the union in order to advance her interests.

Gordillo also used union statutes to prevent rivals from emerging. Gordillo was worried that loyal cadres might establish their own enclaves of power and turn against her. To prevent this, Gordillo changed the structure of the national executive committee (CEN). The CEN went from 70 members in the 1990s to only 30 in the 2000s. This reduction in leadership positions eliminated posts that potential rivals could occupy. In 2011, the CEN eliminated Secretariats altogether, which had been held by individual union leaders, and replaced them with multi-member *Colegiados*. This new structure made it more difficult for individual leaders to develop a personal following (Interview Mexico City September 10, 2012).<sup>13</sup> Changes to union statutes deterred rival leaders from institutionalizing support.

### Coopting Rivals, Cementing Loyalty

Gordillo used a strategy of divide and rule to coopt rivals. As Gordillo's political stature grew, so did her influence, which gave her the ability to reward allies. She rewarded her loyalists with political positions, as national and state legislators, and secretaries of education. As she became a powerful political boss, an increasing number of union cadres and opportunistic politicians orbited around her.

Gordillo served as the gatekeeper who distributed political positions to her followers. She helped union leaders to enter public office (Raphael 2007, 167). The union leadership distributed

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<sup>13</sup> <http://www.wenceslao.com.mx/snte32/comitesnacionales.htm>, accessed May 2, 2017.

opportunities for upward social mobility. Political positions were attractive for union leaders because they offered sizable incomes, generous fringe benefits, and political influence. When Gordillo's cadres took political positions, vacancies opened in the union leadership, which Gordillo could then fill with a new cohort of loyalists. Career ladders became institutionalized: union leaders who rose up through the ranks eventually entered public office, with Gordillo's blessing. These career pathways reinforced the concentration of power at the top.

The union leadership offered rivals political careers in exchange for loyalty. In 1989, Gordillo proposed a new broad front (*frente amplio*) "that would incorporate the various currents found within the union" (Cook 1996, 274). One union adviser described the teachers' union developing a tremendous capacity to reward loyalty. "The union offer a very large number of opportunities and positions to many people (Interview Mexico City February 23, 2012)." Gordillo won loyalty among incoming dissident leaders.

Gordillo was also initially more open to the dissidents but acted in order to stabilize the organization and to build her own support base. To this end she offered members of the CNTE positions on the national executive committee and tried to extract commitments of support in private negotiations with dissident leaders. Those who did not respond to her overtures were marginalized in the competition for power that ensued. (Cook 1996, 274)

As divisions emerged among dissident groups, Gordillo coopted charismatic dissident leaders. One particularly salient example is the case of Blanca Luna, a union leader from Mexico City. Luna led an occupation of the national union headquarters in 1999, in which she was arrested and sent to jail. However, after being released from jail, she engaged in marathon negotiations with Gordillo. She went from being a dissident to a staunch loyalist. Because Gordillo offered her political positions, status, and influence, she ceased her opposition. The dissident movement was thus vulnerable to divide and conquer strategies. Besides Luna, other dissident leaders who joined Gordillo included Rosendo Galíndez, Juan Gonzalez, and Joel Vicente (Interview August 22, 2012). Ambitious young dissident leaders advanced their careers by pledging loyalty to Gordillo. The union used its powerful capacity to convert enemies into allies.

Another strategy Gordillo developed to maintain loyal was to fall back on kinship bonds. Gordillo enlisted her daughters, son-in-laws, grandchildren, and even an ex-husband to help her maintain control over the union. Family members were awarded prominent and influential positions, both in the union and in Gordillo's political organization. Union leaders could betray her, but family had a vested interest in her success. Gordillo delegated power to her two daughters, Monica Arriola and Maricruz Montelongo. Her ex-husband, Francisco Arriola, managed the union finances. Gordillo's son-in-law Fernando Gonzalez (Monica Arriola's husband) became the Sub-Secretariat of Education; her grandson, René Fujiwara (Maricruz Montelongo's son) was a Federal Deputy. Family bonds were strong and provided a reliable core of support; union cadres could not always be trusted.

### Electoral Rules Incentivizing Cohesion

Finally, electoral rules in Mexico incentivized cohesion within the union leadership. In 1977, Mexico adopted a hybrid electoral system. One hundred new seats, called “plurinomial,” which were selected through a closed-list proportional representation formula, were added to the existing 300 seats in the lower house, which were selected in single-member districts. In 1985, 100 more plurinomial seats were added, creating a total of 200 proportional representation seats in the lower house. The plurinomial legislators were elected in five multi-state electoral districts, in which 40 seats were in play. In state legislatures, plurinomial seats were also added. The effect of these new proportional representation rules was to make the legislature more representative by including a larger number of parties.

From the perspective of the regime, these new proportional representation seats were adopted with two goals in mind. First, they sought to legitimize authoritarian rule, by creating space for opposition parties to gain representation. Second, they were designed to fragment the opposition, preventing a single, strong opposition party from coalescing (Ochoa 2004). A number of small left parties opposed the PRI, and the new electoral rules aimed to preserve a divided and weak opposition. New parties needed only two percent of the national vote in order to maintain a legal registry and to get guaranteed seats, which created incentives to divide votes among small parties, rather than to pool votes and build a large party (Eisenstadt 2004, 39). However, these electoral rules did not achieve their intended results. Two major opposition parties, the PAN on the right and PRD on the left, built their organizations and effectively challenged the PRI; they did not succumb to infighting and fragmentation.

For the teachers’ union, these rules contributed to a cohesive leadership. The two percent threshold meant that, in practice, about two million votes were needed to secure political representation. For SNTE, this barrier was significant, but not insurmountable. It gave the union leadership two options for participating in politics. The first option was to maintain the status quo, and remain allied with the PRI. The PRI gave SNTE leaders increasing representation on party lists, and there were benefits to maintaining this alliance. The second option was to defect from the PRI and launch a teacher-based party by reaching the two percent threshold. Electoral rules made this second option possible because they accommodated small, single-issue parties. The Green Party survived as a junior partner for the PRI. If the union leadership coordinated on a new party, the union could separate from the PRI. In 2005, the union leadership did just this, and took steps to form its own, teacher-based party, *New Alliance*.

The key point is that the electoral system created incentives for union leaders to band together as a cohesive group. Had the electoral system set a higher barrier to obtaining representation, for example setting the threshold at three or four percent of the national vote instead of two percent, then union leaders would have remained allied with the PRI. They would have lacked a viable exit option, since such rules would have set the de facto threshold well over 2 million votes, which would have been out of reach for a union that had only 1.2 million members. The extant electoral system positioned the teachers’ union to operate as the organizational foundation for a small party. By building a coalition with small, non-teacher interest organizations (e.g. university student associations), SNTE could reach this threshold and achieve representation.



Had the electoral rules set lower barriers to securing representation, union leaders would not have coordinated on a single party. Had the threshold been set at 1.5 or one percent of the national vote, union leaders would have launched multiple electoral vehicles through the teachers' union, undoubtedly exacerbating factionalism. The two percent threshold turned out to be a "goldilocks threshold," not too high, and not too low. It put electoral representation for the union within reach, but only if the union coordinated on a new party. These rules blocked the formation of competing teacher-based parties. The electoral rules constrained political action: either the union remained allied with the PRI, or the entire leadership supported a new party. Those were the options.

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To summarize, Gordillo used a number of strategies to concentrate power. She organized power informally and regularly changed union statutes in order to coopt, harass, and destabilize potential rivals. She intervened in state-level sections in order to ensure that her allies won power. She converted rivals into loyalists by offering them opportunities for career advancement. The result was a single faction that called itself the "institutional" or "hegemonic" faction, which controlled the union leadership. Finally, Gordillo was aided by electoral rules that only provided representation to relatively large groups that met the two percent threshold of about 2 million votes. These rules created incentives for the union leadership to maintain its cohesion, and either remain allied with the PRI or build a new party.

### *Ramping Up Electoral Mobilization*

The union used its massive organization to ramp up electoral mobilization. To be sure, since SNTE's founding 1943 the union played an ongoing role in electoral mobilization. But during the 1990s and 2000s, the union's electoral activities intensified, marking a major change. This section examines three features of electoral mobilization: (1) the union's strengthening in the context of a weakening party; (2) the union's official political organizations that took part in electoral brokerage; and (3) the group delegates that represented teachers in the legislature.

### Weak Party, Strong Union

As the PRI faced new electoral threats, it turned to the teachers' union to shore up its electoral coalition. In 1988 Cuauhtémoc Cardenas split from the PRI, formed the PRD, and forced the PRI to use massive electoral fraud to remain in power. Electoral fraud prompted massive protests, and forced the PRI to enact a national electoral authority (IFE) that was designated to ensure the credibility of election results, preventing the PRI from resorting to such blatant fraud again. During the 1990s, with freer and fairer elections, opposition parties on the left and right gained ground, and they won an increasing number of governorships. The PRI's vulnerabilities were on full display. A once mighty hegemonic party showed growing signs of weakness.

Freer and fairer elections prompted the PRI to rebuild its electoral machinery in order to hang on to power. Like other labor-based parties that transformed their electoral coalitions, the PRI undertook dramatic efforts to establish new linkages to voters (Levitsky 2003, Ch. 9). One

of the innovations of President Carlos Salinas was to replace corporatist linkages with clientelistic linkages, since industrial unions and peasant associations had declined as a consequence of the neoliberal economic model. Clientelistic networks were expanded, for example, through the anti-poverty program PRONASOL (Bruhn 1996). While this program was formally designed to alleviate rural poverty, its primary purpose was to buy votes. This vote-buying program reflects an overall strategy of reconstituting the PRI's electoral machinery in order to ward off strengthening opposition parties.

Another way that the PRI rebuilt its electoral machinery was by turning to the teachers' union. With the decline of industrial unions and peasant organizations, the teachers' union came to play an increasing role in elections. Presidents Carlos Salinas and Ernesto Zedillo turned to teachers to mobilize political support. SNTE became politicized, and the boundaries that separated union and partisan activities were blurred. Despite a formal separation between the union's leadership structure and the party apparatus, the two were in practice deeply interpenetrated. Even when the union paid lip service to teachers' political rights, and the freedom to support any party (*libertad de militancia*), the union maintained an organic link to the PRI, until 2005. The PRI promoted the union to help it mobilize voters during elections. Grindle argues that the limited decentralization reform in 1992, that accommodated the teachers' union, was a result of SNTE's importance in the upcoming midterm election:

SNTE was still formidable, its membership intact, and its capacity to corral votes and mobilize labor actions still largely in place. And, with congressional elections looming in 1991, the president was well-advised not to insist on a change that would further annoy the union. Its votes were needed. (Grindle 2004a, 66)

### Union-Centered Political Brokerage

Teachers formed a powerful voting bloc. The electoral mobilization of Mexican teachers became a central theme in Mexico's national political debate. Teachers were mobilized from the top-down, through the dense networks that connected the union to teachers. The multiplicity of services that the union provided, as described above, contributed to the union's capacity to mobilize voters. The union's omnipresence, including in schools, social welfare services, and the education bureaucracy, enabled it to monitor its member base and orient the voting behavior of teachers. In other words, the union mobilized teachers as campaign activists and as voters.

An indicator of the union's role in politics can be observed in the organizations of teachers that were dedicated to electoral mobilization. In 1992, SNTE founded the National Committee for Political Action (CNAP), which was based in the National Executive Committee and in state-level chapters. This committee promoted the electoral participation of teachers. It provided campaign finance to union leaders and teachers who pursued public office, regardless of their partisan affiliation. It invited presidential candidates from all major parties to present their education platforms to the union. CNAP was the first instances of the union developing its own political action organization.

In 1995, the National Organization of Electoral Observation of the Teaching Profession (ONOEM) was created in order for teachers to supervise elections, purportedly as neutral

observers. In fact, it organized teachers as electoral brokers (who simultaneously served as poll workers), and mobilized votes on behalf of the PRI (Raphael 2007, 161-63; Munoz 2011, 101). In 2002, ONOEM became the Civic Association of the Teaching Profession (ACM), which was an officially registered political organization. ACM served as a precursor to *New Alliance*. Teachers who remained on the teacher payroll, even though they were dedicated to conducting political outreach full-time, staffed these organizations.

**Table 4**

*Formal Organizations Dedicated to the Electoral Mobilization of Teachers*

<b>Organization</b>	<b>Founding</b>	<b>Ties to SNTE</b>	<b>Electoral Activities</b>
National Political Action Committee (CNAP)	1992	Within SNTE's Leadership	- Support teacher political candidates - Invite presidential candidates to present education platform
National Organization of Electoral Observation of the Teaching Profession (ONOEM)	1995	Separate political organization	- Train union cadres for electoral monitoring - Support the PRI - Precursor to ACM
Civic Association of the Teaching Profession (ACM)	2002	Separate political organization	- Officially registered National Political Group (APN) - Precursor to <i>New Alliance</i>

Teachers were powerful electoral brokers because they were located within multiple, overlapping social networks. Miguel Alonso Raya, a union leader who defected from Gordillo's faction, suggested that a single teacher could deliver as many as twenty-five additional votes (Raphael 2007, 187). Although this might overstate the electoral clout of teachers, teachers undoubtedly had an electoral multiplier effect. This is because the teacher-voting bloc was not just the 1.2 million current members of SNTE; it was also retired teachers, teachers in-training (*interinos*), and other school staff.

In addition to the direct influence of the union over teachers, teachers also had influence beyond the union. They mobilized family members, friends, neighbors, co-workers, the parents of the students they taught, and former students to get out and vote. Even close associates of Gordillo, such as her son-in-law Fernando Gonzalez, publicly acknowledged that teachers "were electoral operators" and schools were sites of political organizing (Ornelas 2012, 219). Organizational resources and social networks enabled the union to project its influence outward, and to mobilize a sizable bloc of voters.

Systematic quantitative data on this massive electoral operation is difficult to find, especially since this kind of data would be incriminating to the union leadership. However, case studies of Mexican states show that teachers were active in electoral politics in public schools. Munoz and Diaz (2010, 1938-41) found that in the state of Mexico, teachers organized political campaigns through public schools, and targeted low-income parents. In Baja California Sur, teachers used public schools to distribute campaign fliers and materials and to influence the vote

choice of parents.<sup>14</sup> The political influence of teachers created major conflicts of interest, schools were appropriated for electoral ends and teachers advanced private political interests. The education bureaucracy and the teacher payroll were used to subsidize these political activities.

In interviews I conducted, union leaders repeatedly acknowledged that teachers formed a powerful voting bloc. Teachers were an important constituency for the PRI during the 1990s, and during the 2000s teachers were even more vital for *New Alliance*. Political candidates who had been SNTE leaders used teachers as their base of support: “of course, teachers and their families were our electoral base” (Interview Federal Deputy August 29, 2012). It is no coincidence that union leaders who became politicians made appeals to teachers, emphasized their experience working in SNTE, and highlighted public education in their campaign platform.

Union leaders became politicians because they developed strong support among teachers. Union-organizing activities strengthened the political bonds between leaders and teachers. One national legislator, who formerly served as Secretary General of her union section, described visiting 800 of 1,700 schools in her state during her tenure as Secretary General. By rising up through the ranks of the union, she developed a public persona and won significant political support: “everyone knows me, and I can’t go to the movie theater without being noticed” (Interview Union Leader, Mexico City August 14, 2012). By advocating on behalf of teachers, union leaders developed political support among teachers, and became powerful electoral brokers.

#### Group Delegates

Because of the massive political brokerage operation, a large number of union leaders became “group delegates,” which Siavelis and Morganstern (2008, 23-4) define as follows:

Group delegates owe their primary loyalty to a particular nonparty functional or social group, which may be a trade union, a business association, or a peasant, religious, separatist, or ethnic group... [they] will stress the interests of the functional group in campaigns and propose policies that serve that group’s interests nationally.

Union leaders represented the interests of teachers in the legislature. These representatives helped to pass pro-teacher education legislation and to increase federal spending on education. In 1993, the union negotiated the landmark General Law of Education, which made middle school and high school (*educacion secundaria*) compulsory. Subsequent amendments to the General Law of Education raised the target level of federal education spending to 8% of GDP. Although, the role of union leaders in the legislature was generally to fine-tune laws that were already on the books, group delegates were usually unable to pass landmark laws because existing laws already were favorable to the union, the union influenced education policy through its legislative fraction. New education laws helped the union claim credit for advancing teachers’ interests, and won the union legitimacy among its members.

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<sup>14</sup> Emir Olivares Alonso. “Escuelas no deben ser espacios para el proselitismo político: Lujambio.” *La Jornada* January 22, 2011.

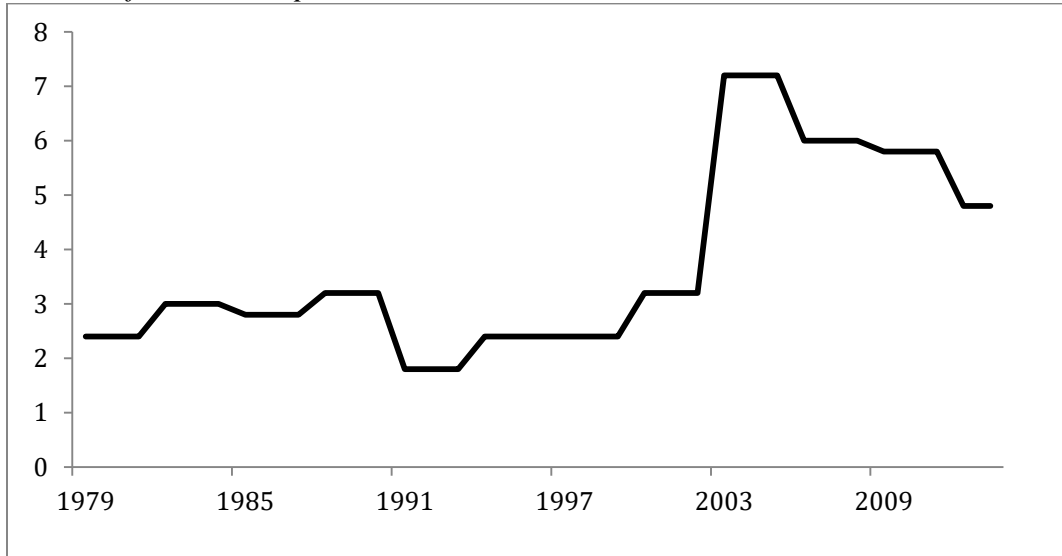
However, the primary role of union leaders in the legislature was to reinforce the union's electoral machinery. Rather than making programmatic reform, the union used coalitions with parties to access state resources and patronage positions. These, in turn, strengthened the union organization, which expended its role in political campaigns. There was a feedback loop between the union's organizational strength, its group delegates, and its partisan alliances. SNTE's expanding organization developed a ravenous appetite for state resources. Running a large, labor-intensive operation was expensive, and ever-larger shares of rents were needed in order to sustain political brokers. The size of the union bureaucracy contributed to rent-seeking, since rents were needed in order to sustain SNTE's sprawling organization.

Data from the Lower House of the national legislature shows the union's increasing electoral participation. The number of union leaders who became Federal Deputies provides an indicator of the overall level of teacher electoral mobilization. To be sure, teacher-representatives in the lower house were just the tip of the iceberg. Teachers were also in the senate, the state legislature, municipal presidencies, and in the governorship of several states. However, data is most accessible for the lower house, which is a good proxy for analyzing electoral mobilization through the union.

According to Figure 2, the number of SNTE leaders was relatively stable from 1979 through the late 1980s; teachers usually made up between two and three percent of the lower house. During the early 1990s, the number of SNTE leaders in the lower house dropped slightly, but then recovered. The year 2000 marks a turning point. There is a peak in the level of teacher representation in 2003, when teachers made up a whopping seven percent of the lower house. There were 35 Federal Deputies who were leaders of SNTE, 25 of whom were well-known Gordillo loyalists. To put this number in perspective, Mexico's most populous territorial units, the Federal District (Mexico City) and the State of Mexico, each of which had 40 representatives. The teachers' union could obtain nearly as much representation as a large Mexican state.

**Figure 2**

*Percent of Teacher-Representatives in the Lower House*



Data from Bensusan and Tapia (2011) and from the Mexican Congress.

It was no coincidence that in 2003, the year when a large number of teachers entered the lower house, Gordillo was the Secretary General and legislative coordinator of the PRI. As Gordillo's power within the PRI increased, she recruited a growing number of SNTE leaders as political candidates. Gordillo's political faction (*camarilla*) gained clout within the party. When the union faced criticism for its high-level of political representation, Gordillo cleverly recruited political candidates who were not SNTE leaders, but who were loyal to her personally. For example, her decision to work with a student organization at a leading private university (ITAM), enabled her to bring a group of young, politically unknown candidates into public office, among them Xiuh Tenorio. However, these student leaders depended on Gordillo for their political careers, and teachers were their electoral base. The level of political representation that teachers achieved in Mexico is truly remarkable.

### *Turning to Instrumentalism*

After the political alternation in 2000, when the PRI lost the presidency, the Mexican teachers' union accommodated political parties from across the ideological spectrum, forming alliances with ideologically incompatible presidents and governors. The union negotiated simultaneously with multiple parties during political campaigns, and then claimed credit for whatever party won. When coalition partners seemed weak, the union shifted its support and established a new, short-term alliance with another party. Teachers thus became an independent and unpredictable electoral force.

While the union's organizational centralization explains its capacity to mobilize votes, its consolidated leadership explains the alliances with all three major parties. Elba Esther Gordillo's consolidation of power played a major role in instrumental negotiations. Leadership cohesion positioned the union to maneuver within the political system. Gordillo had control over

the union leadership and spoke on behalf of the whole union. This enabled her to pledge her support and claim credit for delivering electoral victories. During negotiations, Gordillo did not consult regional leaders or competing factions. Instrumental alliances would have been impossible without the discipline and restraint of regional union leaders. In other countries, negotiations between the government and a divided union leadership broke down. But in Mexico, governments negotiated with a single union leader who was firmly in power, which made pacts easy to form. If politicians ignored Gordillo, she threatened to deliver her political support to their competitors. The concentration of power SNTE's leadership was the basis for political negotiations.

Instrumentalism makes the teachers' union distinctive among Mexican labor organizations. Few labor organization were comparable to SNTE in terms of engaging in political negotiations. SNTE's alliances distinguished it: "the teachers' union had an impressive capacity to form alliances with a wide range of parties, making it stand out among Mexico's labor organizations" (Bensusan and Middlebrook 2012, 803). Research on contemporary Mexican labor politics makes the same point, highlight the tendency of unions to remain loyal to the PRI. According to Bensusan and Cook (2015, 159):

Despite labor's declining influence in the PRI, many of the largest labor organizations continued to support the PRI. Union leaders sustained hope that their fortunes would rise with a return of the PRI to power. In the 2000s some union leaders became legislators under the banner of other parties, including the left PRD. But neither the PRD nor the conservative PAN showed interest in cultivating a labor base, despite their engagement in periodic pragmatic alliances with labor.

Only a few unions defected from the PRI, even after the adoption of neoliberal economic reforms (Murillo 2001, 24; Burgess 2004). The teachers' union stands out as an exception.

### New Alliance

The instrumental political strategy of SNTE was consummated through the formation of the party *New Alliance*. Gordillo's willingness to act as a rogue faction of the PRI alienated powerful party leaders. Relations between Gordillo and other PRI heavyweights, such as Roberto Madrazo, Beatriz Paredes, and Manlio Fabio Beltrones, soured. Gordillo's political faction (camarilla) became differentiated from the rest of the party. In 2005, in major shift, Gordillo formally separated from the PRI, the union's partisan patron of more than sixty years. Rather than simply being ousted, Gordillo negotiated her exit on favorable terms (Raphael 2007, 227-29). The PRI's promotion of SNTE during the 1990s had the unintended consequence of creating distance between the union and its partisan sponsor. Rather than supporting the PRI, the union used its newfound influence to advance its own interests.

The union built this party due to its capacity to mobilize regional union leaders from the top-down. This party was formed out of the Civic Association of the Teaching Profession (ACM). The ACM mobilized 72,000 signatures in 241 district-level assemblies in 7 weeks and achieved a party registry, a process that took other parties years to complete (Munoz 2011, 102). However, the union was not sufficiently large on its own to exceed the electoral threshold of two

percent. To bolster its numbers, SNTE forged an alliance with small interest organizations, such as the university student association at ITAM, a leading private university.

This party coordinated the union's electoral support and formalized its position in electoral coalitions. With a legal registry, *New Alliance* officially added its name to multi-party coalitions and joint party lists. By successfully mobilizing mass support, the party maintained its registry in elections in 2006, 2009, 2012, and 2015. Gordillo did not formally occupy a leadership position in the party, although her family members and close associates did, including her daughter Monica Arriola Gordillo. *New Alliance* articulated the interests of Gordillo's faction; the party permeated the national leadership. Nearly the entire national executive committee pronounced their allegiance in 2005. One high-ranking union leader reported that after meetings of SNTE's national executive committee, *New Alliance* convened meetings that occurred in the same place, with most of the same people (Interview Mexico City March 27, 2012).

Existing literature suggests that the partisan identities of workers are sticky. It is difficult to engineer party switching from above, since voters with established identities ignore new party endorsements. Yet, in Mexico the partisan identity of the teachers' union was transformed. There was only muted resistance, both grassroots and regional, to the creation of *New Alliance*. This party purported to represent teachers' group interests. It positioned itself as a non-ideological alternative. The union leadership avoided using blatant coercion, instead resorting to softer methods of influence. Rather than forcing teachers to betray their established partisan identities, teachers were encouraged to support *New Alliance* alongside whatever party they had long supported, by casting a split ticket vote. SNTE leaders did not try to convince teachers to cast a straight ticket vote for the teacher-based party. By taking this approach, Gordillo separated a significant chunk of the teacher-voting bloc from the PRI, taking this support for herself. It is remarkable that by 2014, *New Alliance* had 230,000 registered party members.<sup>15</sup> This shows the union's discipline.

### Negotiating with Presidents

At the national level, *New Alliance* sought an alliance with the leading presidential candidate. To hedge its bets, it also reached out to other major contenders, in case the candidate it endorsed lost.

The first instance of such instrumentalism occurred in 2000, when Gordillo established an alliance with PAN President Vicente Fox. During the presidential campaign, the union sent mixed signals of support, simultaneously claiming to support the PRI and the PAN (Raphael 2007, 182). After taking office, President Fox acted as though he owed Gordillo a huge favor, and behaved as if she had played a major role in his electoral victory (Raphael 2007, 195). Fox gave Gordillo and SNTE control over ISSSTE, the health services institute for teachers, naming Gordillo political operator Benjamín González Roaro to this position. Gordillo and Marta Sahagún, the first lady of Mexico, worked on a joint project on a *Guide for Parents* that resulted in lucrative contracts for the union, worth approximately 53 million pesos. This was despite the

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<sup>15</sup> <https://nueva-alianza.org.mx/historia/>, accessed July 24, 2016.



fact that this guide was panned for its abstinence-only sex education unit, and was ultimately never used (Raphael 2007, 1996-97). Gordillo returned the favor by supporting Fox's conservative economic policies, even his proposed value-added tax on food and medicine. While Gordillo held the positions of the PRI's legislative coordinator and Secretary General, she cut side deals with the PAN President. The union defected to the new ruling party in order to maintain privileged access to top policy makers.

In the 2006 presidential campaign, Gordillo courted both Felipe Calderon of the PAN and Andres Manuel Lopez Obrador of the PRD. Gordillo reached out to Lopez Obrador, claiming that teachers were very leftist (Cano and Aguirre 2013). At the last minute, Gordillo decided to support Felipe Calderon of the PAN (Raphael 2007, 276-77; Castañeda 2011, 5). The teachers' union participated in the PAN primary election. Teachers were important in Calderon's defeat of his rival Santiago Creel (Munoz 2011, 104). Repeating the strategy used in 2000, Gordillo sent mixed signals to leading candidates, and after the election she claimed credit for delivering pivotal votes to the winning candidate.

Gordillo claimed credit for Calderon's narrow electoral victory in 2006. Gordillo, because of her high profile within the PRI did not just deliver the teachers. She also convinced PRI governors to support the PAN. A 2006 intercepted phone call between Gordillo and the PRI governor of Tamaulipas, Eugenio Hernández Flores, revealed Gordillo endorsing Felipe Calderon and telling the governor to support him.<sup>16</sup> Calderon rewarded Gordillo for her support. Gordillo's allies were given positions in Calderon's cabinet, including the Sub-Secretariat of Basic Education, the National Lottery, ISSSTE, and the Institute of State Social Security. These appointments generated significant criticism in the media for their blatant instrumentality.

Gordillo also received rents from President Felipe Calderon. SNTE received a contract for an educational technology project without taking competing bids (Ornelas 2012, 108). It also gained influence over a health program for low-income students, even though this program should have fallen under the jurisdiction of the Secretariat of Health (Ornelas 2012, 205). Gordillo embezzled funds from ISSSTE, the teacher health institute, in order to finance her political party, *New Alliance*, as Miguel Angel Yunes, a prominent former ally, reported. Gordillo used her political influence to get access to rents in order to run her expensive electoral operation. Government contracts for supplementary education programs were a giveaway to the union in exchange for its political support.

Gordillo became a power broker who gained experience in political negotiations because she had been in politics for such a long time. Meanwhile politicians, even presidents, faced term limits and thus needed to cultivate the political support of power brokers like Gordillo to govern effectively.

### Negotiating with Governors

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<sup>16</sup> For a transcript see Carmen Rangel Sánchez. "Grabaciones incómodas" *El Mexicano* July 10, 2006. See Ornelas 2012 on the negotiations between Gordillo and Calderon for the Alliance for Education Quality (Alianza Calidad Educativa ACE).

The union's embrace of the PAN marked a shift towards instrumental alliances across different tiers of government. While the union negotiated an alliance with center-right President Felipe Calderon, it simultaneously negotiated with the left PRD mayor in Mexico City. Gordillo maintained strong ties to various PRI governors, which she had established when she was in the PRI leadership. Gordillo channeled her national resources into state-level contests, and thereby delivered support to gubernatorial candidates in tight elections.

The decentralization reform in 1992 opened the door for the union to forge instrumental alliances with governors. The union delivered electoral support and it helped governors to manage teacher unrest, in exchange for patronage positions and lucrative contracts issued by the SEP. With the founding of *New Alliance* in 2005, this party established state branches that negotiated their own partisan alliances. According to Table 2, between 2006 and 2008, in only 8 states did *New Alliance* establish alliances with PRI governors. In the majority of states the party maintained its independence from parties. Between 2009 and 2015, it forged instrumental ties to PRI governors, as the PRI was in ascendance and the PAN was discredited. A legislative aid said that *New Alliance* engaged in political negotiations based on local conditions, or the "local problematic" (Interview Mexico City March 14, 2012).

**Table 5**

*Coalitional Partners of PANAL, by State 2006-2015*

	2006-2008 (N)	2006-2008 (%)	2009-2011 (N)	2009-2011 (%)	2012-2014 (N)	2012-2014 (%)	2015 (N)	2015 (%)
PRI	8	26%	18	56%	14	47%	8	62%
PRD	0	0%	0	0%	0	0%	2	15%
PAN	7	23%	5	16%	3	10%	0	0%
PAN+PRD	0	0%	2	6%	2	7%	0	0%
None	16	52%	7	22%	11	37%	3	23%
Total	31		32		30		13	

Sources: Fernandez 2012, 291-92 and local newspapers

Instrumentalism in Mexican states involved switching partisan alliances. Tables 5 and 6 show that *New Alliance* switched its state-level partisan support in order to remain in the governing coalition. Table 6 shows that the union opportunistically moved into the governing coalition. While in 2006 the union was initially independent or in the opposition, the union increasingly entered the governing coalition. The union was registered as being part of a multi-party coalition that won the governorship and municipal elections in major cities. In the periods 2009-11 and 2012-14 more than half of the party's state-level affiliates were in the governing coalition. In exchange for their political support, governors gave state-level sections of SNTE land, hospitals, pharmacies, and recreation centers (Interview Journalist July 17, 2012).

**Table 6***PANAL Switching its Partisan Coalition, by State 2006-2015*

	2006-2008	2009-2011	2012-2014	2015
Maintain Support for Party from Previous Election	Baseline	18	20	5
Switch Support	Baseline	13	10	7
Total	31	31	30	12

Sources: Fernandez 2012, 291-92 and local newspapers

**Table 7***PANAL in Winning Coalition, by State 2006-2015*

	2006-2008	2009-2011	2012-2014	2015
Winning Coalition	12	17	15	5
Opposition or Independent	19	15	14	8
Total	31	32	29	13

Sources: Fernandez 2012, 291-92 and local newspapers

For their part, governors faced strong incentives to ally with *New Alliance*. The union regularly alternated support between the PRI and PAN, which faced close electoral contests. The union's willingness to approach whatever party seemed most likely to win made it difficult to avoid. *New Alliance* was even more flexible in its political support than other small parties, such as the Green party (PVEM), which only formed alliances with the PRI. Although the PRD was less receptive to the union's appeals, Andres Manuel Lopez Obrador offered a principled rejection of an alliance with Gordillo, in some districts, such as Mexico City, even the PRD allied with the party. Teacher votes were a valuable commodity in competitive elections, and party leaders knew that SNTE was strong and disciplined.

The union claimed credit for being pivotal voting bloc and for demobilizing dissident teacher protests. The union adapted to whatever situation it encountered, and accommodated whatever government was in power. It positioned itself to be kingmaker. From the party's stand point, the perceptions of union strength and the closeness of elections made the union an appealing ally. However, the key to instrumentalism was the consolidation of the union leadership. Negotiations occurred because power was concentrated within the figure of Elba Esther Gordillo. Because she had the backing of a disciplined group of union leaders, she persuaded governors that she could deliver pivotal support to them.

### *Conclusion*

This chapter applies the analytic framework from Chapter 1 to the case of the Mexican teachers' union (SNTE). Of the three cases analyzed, Mexico underwent the most dramatic change in its relations to political parties after the democratic transition in 2000. The union

demobilized teacher protests, which played only a marginal role in the union's political repertoire after 1989. The union formed teachers into a voting bloc, but SNTE was not beholden to any single party. Instead, partisan support was fickle and opportunistic, and the union engaged in strategic party switching among all three major political parties. In the context of the decentralization of education in 1992 and intensifying state level electoral competition, the union established different partisan alliances at the federal and state levels. Because of this political strategy, the Mexican teachers' union sparked national debate about the role of teachers in politics and the tremendous influence they exercised.

This shift towards instrumentalism reflects both continuity and change in the union's political strategy. After the political transition in 2000, the organizational legacy of the teachers' union took on new significance. Unlike other labor unions in Mexico, which were weakened by neoliberal reforms, the teachers' union took "advantage of transition contexts" and fundamentally changed its partisan alliances (Bensusan and Cook 2015, 156). Also striking are the continuities in the union's ongoing corporatist relations with the ruling party. While the union's separation from the PRI was path breaking, the union's political strategy was adaptive. The union sought to maintain access to the ruling party in the context of multi-party competition. SNTE resembled a miniaturized version of the PRI, responding pragmatically to political and economic change while coopting rivals. However, by breaking from the PRI, the union maintained its historically rooted corporatist relationship to the ruling party in an emerging multi-party system.

## Chapter 4: Movementism in Argentina

The Argentine case is the polar opposite of the Mexican case analyzed in the previous chapter. The Mexican teachers' union had a strong organization and a cohesive, national leadership. These factors enabled it to participate in elections and to construct flexible alliances with unlikely partisan allies. By contrast, the Argentine union had a weak organization and a divided, regional leadership. As a result, it adopted an oppositional strategy, organizing recurrent protests and serving as an unreliable coalitional partner, even for pro-labor governments.

The core idea here is that unions that developed divided leaderships and decentralized organizations behaved quite differently from unions that developed cohesive leaderships and centralized organizations. After democratization in Argentina in 1983, the union's divided leadership and weak organization affected multiple aspects of its political behavior. It oriented the union towards protest while limiting the union's role in the electoral arena. Internal divisions also made the union an unreliable coalition partner, preventing the union from engaging in corporatist exchanges.

This chapter is organized into four sections. The first describes the *movementist* political orientation of the Argentine teachers' union. Protests were the Argentine union's primary mode of interest representation; various groups within the union organized them, and they had a social movement character. The second section examines the roots of movementism, which stemmed from the union's weak organization. Repression during the military dictatorship, the resilience of rival factions, and territorial cleavages that were exacerbated by education decentralization jointly contributed to this weak organization. The chapter then explores the forces that shaped the union's limited role in electoral politics. Divisions within the union, which had their origins in how the union initially came together and in the pressures exerted on the union by electoral rules, made it difficult for teachers to form a voting bloc. Finally, the chapter turns to the Kirchner moment. When a pro-labor government sought to negotiate with the teachers' union, leadership divisions prevented the union from becoming a reliable political ally.

### *Indicators of Movementism*

The political engagement by teachers' unions in Argentina is best characterized as movementist. Movementism is a concept that is widely used among Latin American scholars, and refers to contentious political strategies that take place outside of institutionalized political channels (McGuire 1996, 1-7; Alberti 1997). Central to movementist political parties and labor unions is a preference for popular mobilization in the streets as a form of direct democratic representation, over political representation through vertical relations between politicians and voters. Movementism resembles anarcho-syndicalism in that both reject electoral mobilization and party politics because of the divisions such institutionalized paths to power create among rank-and-file members (Przeworski and Sprague 1986; Sorel 1999). In this analysis, movementism refers to the reliance of Argentine teachers on protest as a primary mode of interest representation. This section elaborates movementism by highlighting three features of teacher mobilization in Argentina: 1) the frequent outbreak of teacher protests, 2) the multiple groups involved in mobilizing protests, and 3) the social movement character of protests.

## Frequent Protest Outbreak

The frequency of teacher protests made them a routine part of political life in Argentina. Analysts have focused on teacher protests in response to policy grievances, hyperinflation and the erosion of teacher wages during the 1980s, the decentralization reform of 1992, and harsh austerity measures imposed on education budgets in the wake of the 2001 financial crisis. Yet, teacher protest preceded these policy grievances and they continued after 2007, when governments sought to demobilize protests through improvements in teacher compensation. While there is volatility in the level of teachers labor conflict in a given year, cycles of protest were remarkably stable over time. Contrary to extant social movement literature, which suggests that social movements tend to bureaucratize and demobilize over time, the Argentine teachers' union sustained a militant political orientation (Piven and Cloward 1979, xv). Teachers were never quiescent; every year after the democratic transition in 1983, a large number of teachers took to the streets.

While Argentine labor unions, across sectors, organized a large number of protests, teachers consistently stood out as one of the most militant groups of workers. Teacher protests were among the largest and most significant, even relative to other militant unions, such as health workers and other public employees. Between 1984 and 1993, teachers accounted for 12 percent of all strikes, 24 percent of strikers, and 37 percent of all workdays lost (McGuire 1996, 138-9). Between 2006 and 2009 teachers were responsible for the largest number of workdays lost, accounting for 53 percent, compared to 19 percent for other public employees and 18 percent for health workers. Teachers had the highest proportion of participants in strikes, making up 40 percent of all strikers, compared to 18 percent for other public employees and 12 percent of health workers. Finally, teachers organized 13 percent of all strikes, which was the third highest number of protests, after other public employees (34%) and health workers (15%) (Chiappe 2011, 18). Data on labor mobilization shows that from the 1980s through the 2000s, teachers were one of the most militant sectors of labor.

**Table 8**

*Labor Protests, Teacher Compared to Other Sectors*

	1984-1993		2006-2009	
	Teacher Protests, as a % of Total Labor Conflict	Most Militant Labor Sector	Teacher Protests, as a % of Total Labor Conflict	Most Militant Labor Sector
Work Days Lost	37%	Teachers	53%	Teachers
Strikers	24%	Teachers	40%	Teachers
Strikes	12%	Other Public Employees (Teachers 2 <sup>nd</sup> )	13%	Other Public Employees (Teachers 3 <sup>rd</sup> )

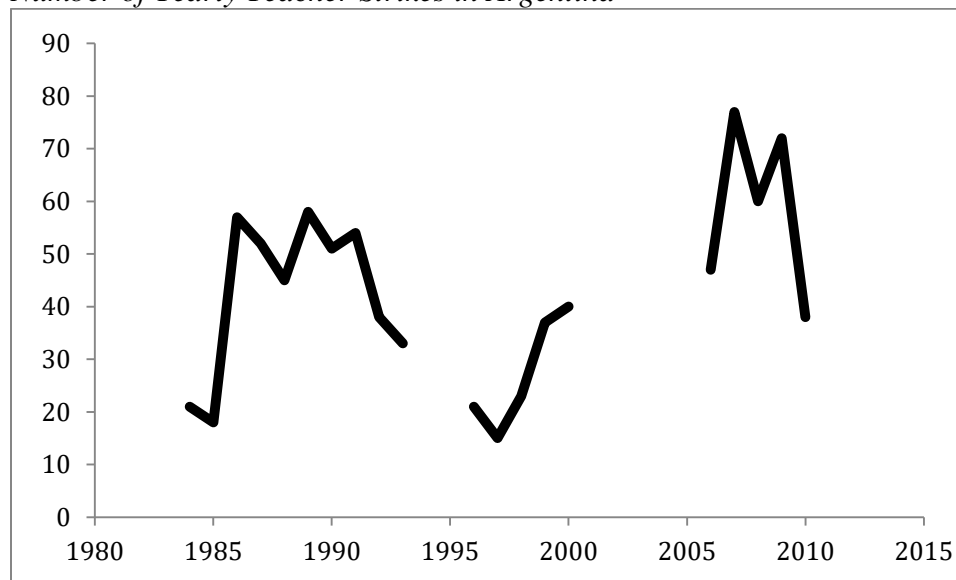
Sources: McGuire 1996; Chiappe 2011

Teacher protests have been sustained over time despite various policies aimed at demobilizing them. Policies embraced by President Carlos Menem, that rewarded teachers who did *not* participate in strikes by giving them bonuses, failed to contain teacher protests during the

1990s (Murillo and Ronconi 2004). Protests did not decline after a pro-labor government was elected in 2003. The Kirchner government included the union leadership in the policymaking process, increased education spending, and passed a landmark labor law that institutionalized national level collective bargaining (Etchemendy 2011). But in the context of this favorable policy environment, teacher strikes actually *increased* from 2006 to 2009. Teacher strikes have recurred over time, and they have continued even when political and policy conditions favored demobilization.

**Figure 3**

*Number of Yearly Teacher Strikes in Argentina*



Sources: McGuire 1996; Murillo 1999; Murillo and Ronconi 2004; Chiappe 2011; Etchemendy 2013

Argentina's persistent teacher protests stand out in comparison to Mexico and Colombia, two countries where after democratic transitions teachers represented their interests through institutional channels. In Mexico a robust dissident protest movement emerged in 1979. This movement regularly organized major protest events throughout the 1980s, but was coopted and demobilized during the 1990s after a new union leadership took over (Cook 1996, 316-9; Foweraker 1993). After education decentralization in 1992, teacher protests diminished significantly. Subsequent episodes of teacher unrest, including in the state of Oaxaca in 2005 and 2006, and in several states in 2009 and 2013 in response to a new teacher evaluation, did not achieve the same territorial scope or level of intensity as they did in Argentina (Tapia 2013). In Colombia there were major protest events throughout the 1990s. Yet, after 2001 teacher protests declined precipitously in response to a crackdown by conservative governments. Since the early 2000s, teacher protests remained small and intermittent in Colombia (Martinez Pineda 2007, 356-62; CINEP database). Argentina continued to organize major protest events throughout the 1990s and 2000s, when teacher protests in Colombia and Mexico declined.

**Table 9***Major Teacher Protests by Decade*

	<b>Argentina (High)</b>	<b>Colombia (Moderate)</b>	<b>Mexico (Low)</b>
1980	- Marcha Blanca (1988) - Provincial protests	- Departmental protests	- Dissident state protests - Protests against Carlos Jonguitud (1989)
1990	- Protests against Federal Law of Education (1992) - Carpa Blanca (1997-9)	- Protests demanding higher teacher salaries (1994-8)	- Protests against decentralization (1992)
2000	- Protests against austerity (2001-3) - Provincial protests (2006-10)	- Protests against Law 715 (2001)	- Protests in Oaxaca (2005-6) - Protests against teacher evaluation (2009)
2010	- Provincial protests - National protests (2016)	- National protest for higher teacher wages (2014)	- Protests against teacher evaluations (2013)

Note: The shaded boxes indicate decades of significant teacher labor conflict, according to event histories.

Sources: Cook 1996, Tapia 2010, Fernandez 2012; CINEP social movement database, Martinez Pineda 2012, Bocanegra 2014; Chiappe 2010, Gindin N.D., Suarez 2005, OREAL, *Tendencias Economicas y Financieras*.

### Multiple Groups

Teacher protests in Argentina cannot be attributed to a single, organized group. Rather, multiple groups within the union were responsible for protests (Chiappe 2011, 27). The union leadership sought to stay in front of the teacher labor movement. The presence of militant groups in provincial unions put pressure on moderate union leaders to organize teacher strikes, in order to avoid being outflanked on the left. The official union leadership sought to preemptively call teacher strikes before dissident and militant groups organized wildcat strikes (Murillo 2001). For example, Robert Baradel, the Secretary General of the teachers' union in Buenos Aires Province (SUTEBA), claimed credit for organizing yearly teacher protests for higher wages. Yet, dissident and militant groups that held power in union locals, that Baradel did not control, influenced the decision of SUTEBA to organize recurrent strikes. The official union leadership was not the only group that mobilized teachers. Rival factions within the union periodically organized small-scale, unpredictable protests, which occurred without the official leadership's knowledge or consent.

Within the union, two groups were responsible for instigating teacher unrest: militant provincial leaders and grassroots dissidents. Militant provincial leaders had ties to small far left parties. These groups were unsuccessful at winning power in the national executive committee and they were too small to win public office. However, they penetrated several provincial unions. These militant enclaves were bureaucratically organized and hierarchical; they ensconced themselves in provincial executive committees where they held onto power. Neuquén, Santa Cruz, and Tierra del Fuego were the most prominent provinces that militants controlled (Chiappe 2011, 41-42). In addition, they also won power within provincial unions by competing



in elections for leadership positions in union locals. These groups refused to cooperate with the national union leadership, and they called frequent provincial protests, which in some cases, most notably in Neuquén, prompted violent repression. Militant groups hindered union cooperation with governments and posed a significant challenge to the national leadership.

In addition, groups of grassroots dissidents that emerged in multiple provinces also organized protests. Dissident groups, known as the “self-mobilized,” did not formally control the union leadership (Migliavacca 2011). Rather, these dissidents persisted within unions that were led by more moderate groups, and developed their own parallel structures of mobilization. Dissidents in Argentina resembled dissidents in Mexico during the 1980s, in that both had strong ties to grassroots teachers and were horizontally organized (Cook 1996). The self-mobilized groups also pressured union leaders to call protests. They were active in a number of provinces, including Misiones, Corrientes, Formosa, the Province of Buenos Aires, San Luis, Salta, and Chubut (Chiappe 2011, 8). In the province of Entre Rios in 2002, while the official union leadership sought to restrain mobilization, the self-mobilized proposed an indefinite strike, even though such a strike was declared illegal and resulted in severe administrative penalties (Suarez 2005, 136). In sum, when the official leadership acted with restraint, grassroots dissidents organized spontaneous protests.

### Social Movement Character

Teacher protests in Argentina are also notable because many had a creative, social movement character. Teachers organized caravans, taught outside of school buildings, engaged in hunger strikes, and organized silent marches (Suarez 2005, 173). Teacher protests generated public sympathy, positive media coverage, and parental support, which increased the pressure on governments to enact policy change. The union conceived of these demonstrations as popular education, which conveyed why teachers were protesting and what they aimed to achieve. Given the frequency of protests, teacher protests also took more traditional forms, including blocking roads, closing schools, occupying public spaces, and demonstrating outside of government buildings. Still, it is remarkable how the union relied on social movement tactics. By using a sophisticated communication strategy, the union applied more pressure on governments to respond to teachers’ labor grievances.

The White Tent (1997-9) protest exemplifies the social movement character of teacher demonstrations. During this protest, teachers pitched a white tent in front of the National Legislature. The “white” symbolized the uniforms that primary school students wore, and the tent symbolized the long-term duration of the demonstration, it was a sleep-in vigil. Teachers made national demands to end austerity measures on public schools. This protest became a national spectacle: it included a hunger strike with a rotating group of participants that lasted 1003 days (Suarez 2005, 27-8). A diverse group of Argentine intellectuals, artists, activists, priests, media personalities, and athletes voiced their solidarity with the teachers (Saurez 2005, 23-6). This protest attracted positive media attention because, unlike other teacher protests, it did not disrupt the academic calendar. The protest involved 1,400 teachers, 86 civic groups, 475 cultural events, 46 radio shows, and 29 television shows (Corrales 2004, 344). It helped the union to win the National Fund for Teacher Incentive, a law passed in 1999 that increased the

salaries of the worst paid teachers in the poorest provinces. This protest was described as “something new and different,” which had symbolic resonance in Argentina (Suarez 2005, 27).

The innovation of the White Tent diffused to the provinces. Smaller White Tent encampments cropped up in front of provincial capitals throughout Argentina, including in Corrientes, Jujuy, Santa Cruz, Tucumán, and Buenos Aires (Suarez 2005, 101). In these provinces, unions experimented with unconventional forms of demonstration. Although provincial-level demonstrations received less media attention than their national counterparts, they enjoyed large-scale teacher participation in demonstrations and contributed to the recruitment of new union members (Suarez 2005, 101-2). Provincial unions also communicated the consequences of austerity measures imposed onto the education sector through the use of public spectacles. One protest in the province of Buenos Aires, entitled “the circus of education reform,” included a parody of a circus that ridiculed education policy during this period (Suarez 2005, 28-9). Teachers did not receive wages or received them late, wages were frozen, teachers were subject to irregular forms of payment, such as special government IOUs, and the social welfare services for teachers deteriorated. These conditions were so dismal they resembled a circus.

To summarize, while teachers’ unions in Mexico and Colombia formed teachers into an organized voting bloc and constructed alliances with political parties, teachers in Argentina relied on protest as their primary political strategy. Protests forced government officials to the negotiating table and pressured them to make concessions to the union. The regularity of teacher protests, despite multiple efforts by governments to demobilize them, made them a national political issue. Various groups within the union, including militant provincial union leaders and grassroots dissidents, organized protests. The official union leadership struggled to stay in front of the teacher labor movement. A significant number of teacher protests had a social movement character, relying on national symbols to win public support.

### *The Roots of Movementism*

Movementism, I argue, stems from the internal divisions and weak organization of the teachers’ labor movement in Argentina. The largest union, CTERA, only organizes 55 percent of the teacher labor force, and competes with smaller teacher labor organizations. CTERA is a decentralized confederation, which brings together twenty-four provincial unions. Internal divisions and a weak organization enables militant provincial union leaders and grassroots dissidents to influence teachers. This loose organization amplifies oppositional voices in the union; national leaders lack the capacity to impose discipline. This section describes and explains how the union’s weak organization and divided leadership make it movementist.

### Late Union Formation and Military Rule

The historical development of the Argentine Confederation of Teachers (CTERA) differed markedly from the standard narrative of Peronist unions in Argentina. Early industrialization in Argentina produced a strong blue-collar labor movement, which achieved a high level of union consolidation during the government of Juan Peron (1946-1955) (Collier and Collier 1991, 331-350). But Peron’s consolidation of the union movement centered on industrial

unions, and the teachers' union did not develop until decades later. In 1953, the Peronist party sponsored the Union of Argentine Teachers (UDA), a traditional Peronist union but UDA did not consolidate control over the teaching profession (Gindin 2011, 102-11). Teachers identified with the middle classes, and in large numbers they rejected the Peronist party and its officially-sponsored union (Perazza and Legarralde 2008, 14; Vasquez 2005). During this period, different teachers' unions had ties to different political parties, such as Socialist, Communist, Anarchist, Peronist, and Radical, which left the Argentine teacher movement divided.

After UDA failed to bring teachers together, another teacher labor organization, CTERA, began to build a national teacher organization. Yet, CTERA, founded in 1973, had little time to develop an organization. Shortly after its founding, this union suffered severe repression at the hands of the military junta (1977-1983), which violently cracked down on union leaders and leftist partisans. Both national and provincial union leaders faced state terrorism, with more than 600 teachers' unionists killed or disappeared (Nardacchione N.D. 15). Others were unlawfully imprisoned, faced death threats, tortured, kidnapped, and forced into exile. Teachers suspected of sympathizing with the union and the political opposition were also arbitrarily fired. Union leaders recounted these human rights violations in their biographies. By targeting the union leadership, the military dictatorship disrupted the union's early organizing efforts.

Meanwhile, the military denied CTERA a legal registry and access to state subsidies. During military rule, teachers were banned from assembling and union publications were censored. The union was unable to collect union dues, manage social programs for teachers, engage in economic activities, or negotiate with the government (Gindin 2006, 96). Although the union operated clandestinely, it did so in a diminished fashion, which weakened its ties to its base. Whereas labor unions in the industrial sectors emerged from military rule intact, they had strong organizations before the military came to power, the teacher movement emerged weak. Argentina is not unique in this regard. Military dictatorships in Chile and Brazil (albeit to a lesser extent) also stunted the development of teachers' unions in those countries (Perez and Sandoval 2008; Fontoura et al 2008).

Military rule set back organizing efforts by Argentine teachers' unions, but it failed to destroy them. After democratization in 1983, the teachers' union began to rebuild its organization. In 1984 CTERA had 150,000 members divided among 54 base organizations. By 1990, CTERA became one of a handful of influential labor unions in Argentina. Teachers had one of the highest rates of unionization of all sectors of Argentine labor, at 55 percent (Murillo et al 2002, 210). By 2001, CTERA had 233,585 members that were organized into 25 base organizations, one in every province, and by 2012 it had 315,000 members (Chiappe 2012, 3). It took a leadership role within the independent labor central, the CTA. CTERA slowly recovered from the repression it had endured under military rule and renewed its organizing efforts.

### Partisan and Factional Divisions

Although CTERA rebuilt its organization after military rule, it only partially consolidated the teacher movement. In 1985, after democratization, CTERA finally received its legal registry (*personeria gremial*), which enabled it to deduct union dues from teacher salaries and to post union representatives in schools (Gindin 2011, 124 and 131). Yet, rival teachers' unions

maintained their legal registries, hindering the consolidation of the teacher movement. These rival unions included the Pro-Peronist teachers' union (UDA), the technical teachers' union (AMET), the union representing teachers who worked in publicly-financed private schools (SADOP), an independent teachers' union (CEA), as well as a large number of small, regional unions (Perazza and Legarralde 2008, 19-21). Whereas in Mexico 100 percent of teachers were members of SNTE, since union affiliation was automatic, in Argentina teachers filed an application to join a union, and only 55 percent joined CTERA (Chiappe 2012, 2-3).

In addition to the divisions among teachers' unions, there were also partisan and factional divisions within CTERA, since the confederation had initially come together from below. In 1973, 147 provincial unions joined forces to form CTERA (Murillo 2001, 164). These provincial unions had distinct partisan identities, at CTERA's founding, "diverse partisan identities co-existed" (Murillo 1999, 42). The union's founder, Alfredo Bravo, was a Socialist, but other union leaders identified with the Communist, Peronist, and Radical parties. The large number of unions and partisan divisions among them hindered coordinated, national action. To build a stronger labor movement, CTERA sought to consolidate its union base.

Yet, union consolidation generated conflict among rival factions, which was put on full display during the 1980s and 1990s. CTERA's task was to bring together the divided teacher movement and to create one encompassing union affiliate per province. Union consolidation reduced the number of leadership positions, and as a result, leaders of smaller unions had to give up their influence for the sake of a stronger labor movement. CTERA's efforts to consolidate the fragmented teacher movement prompted resistance and the withdrawal of several unions. For example, while two unions, AMET and UDA, joined CTERA in 1985, they left the confederation in 1988 because neither wanted to disband and reintegrate into CTERA's provincial organizations (Gindin 2011, 124-25).

Partisan conflict also broke out within CTERA. In 1985, CTERA's third national congress selected Wenceslao Arizcuren of the Radical Party (UCR) to be the union's Secretary General; the Secretary General was the most important leader of the national executive committee. In 1987, union activists reversed course, and at CTERA's fourth national congress they selected Marco Garcetti from the Peronist party to be CTERA's Secretary General. But this partisan transition created a major schism. Arizcuren refused to step down, and the union temporarily fractured into two organizations headed by two Secretaries General. Garcetti built a broad-based coalition of the center-left Peronists, the more orthodox Peronists (e.g. UDA), and moderate sectors from the UCR; while Arizcuren had the support of the UCR and the left (Gindin 2011, 127). Eventually, Arizcuren was forced out of power (Gindin 2006, 97). This episode illustrates the ongoing problem of factional disputes within the union.

Efforts to consolidate power in the national executive committee also fueled factional conflict. In 1988, the center-left Peronist group linked to Garcetti, known as the *Lista Celeste*, embarked upon a project to "Peronize" the union. The national executive committee had previously been selected through a proportional representation formula, which enabled power sharing. Union leaders from multiple party lists held power at the same time, even though these leaders came into conflict and paralyzed decision-making within the union leadership (Murillo 1999, 42). The *Lista Celeste* changed the union's statutes, adopting a winner-take-all formula for

CTERA's internal union elections. Union leaders from a single union list competed in direct union elections and each union member voted for a list. The new system allowed competing lists to present different programs to the base and to alternate control over the union leadership, in order to alleviate paralysis and conflict within the leadership.

The conflict between Arizcuren and Garcetti, and the efforts to consolidate power in the national executive committee, generated a sharp backlash in the provinces. In response to the perceived power grab by the *Lista Celeste*, non-Peronist provincial unions in Chaco, Tucumán, Santiago del Estero, and Santa Cruz withdrew from CTERA in protest (Gindin 2011, 129). They only rejoined the confederation in 1992, when the union came together in opposition to the education policies of President Carlos Menem. The provincial union of Santa Fe withdrew from CTERA in 1993 because of the lack of "real democracy" in the union and the fear that CTERA would intervene in provincial affairs (Cardini and Veleda 2002, 58). Santa Fe aligned with the Socialist party, and it rejected the *Lista Celeste's* efforts to Peronize CTERA. Santa Fe reentered CTERA after negotiating with CTERA Secretary General Marta Maffei, who was not a Peronist, and ameliorated concerns about the union's involvement in party politics. Efforts to align CTERA with the Peronist party prompted provincial unions to break away and assert their autonomy from the national leadership.

While the *Lista Celeste* marginalized leftist groups at the national level, these political groups carved out enclaves of support at the provincial level and maintained their capacity to mobilize teachers. Some militant groups formed their own alternative lists and competed in internal union elections. They won leadership positions at the provincial and sub-provincial levels. Others refused to participate in union elections and became dissidents. Dissident teachers, or the "self-mobilized," emerged in 1991, posing an outsider challenge to the official union leadership (Migliavacca 2011, 13). Dissident teachers mobilized a diverse group that included teachers from multiple unions, non-unionized teachers, and the parents of students. The dissidents gave ordinary teachers the ability to challenge the union leadership and demonstrated the robust grassroots activism within the union.

Union leaders in Argentina lacked the tools to discipline and control militant and dissident groups. The factional and partisan divisions within the union, as well as the union's decentralized organizational structure, incubated rival groups. The dominant faction, the *Lista Celeste*, was not able to incorporate dissidents and militants into its organization, and these groups continued to pose a challenge to the established union leadership. Dissidents cast a permanent shadow over the official leadership, because they had the capacity to mobilize spontaneous protests, even when such protests were deemed illegal. Moreover, governments negotiated with the official union leadership, and not with the dissidents, which fueled dissident protests.

Bottom-up resistance to union consolidation produced a weak national executive committee. CTERA depended on provincial unions because provincial unions collected union dues and then transferred 10 percent of these dues to CTERA's national coffers. This revenue model gave provincial unions negotiating leverage, because they had the option of withdrawing from CTERA and withholding their share of union dues. Therefore, decision-making within CTERA was "tied to the provincial organizations" (Nardacchione N.D. 14). Moreover,

provincial union leaders staffed the national executive committee. The national executive committee did not have permanent, national positions. Only CTERA's secretary general worked full-time. The rest of the national executive committee was staffed by provincial leaders who worked part-time. The national executive committee was, then, based in the provinces; many telecommuted and were only physically present in the union headquarters once a month. Efforts to consolidate power within the union failed, and the weak national executive committee had few tools to discipline provincial unions.

### Education Decentralization and Deepening Regionalism

While CTERA had a provincial organization since its founding, the 1992 decentralization reform enacted by President Carlos Menem exacerbated the power of the provinces over the center. Menem, a Peronist, was elected in 1989 with a mandate to represent popular interests and to adopt a heterodox set of economic policies. However, he surprised his political allies and opponents alike by embracing the neoliberal economic model (Stokes 2001; Murillo 2001, 134). Menem privatized state-owned enterprises and adopted the Convertibility plan, which fixed the Argentine peso to the US dollar.<sup>17</sup> Menem re-configured the Peronist party, demoting labor leaders, while turning increasingly to regional party bosses and business leaders for support.

Although initially CTERA endorsed Menem's candidacy, the union became one of Menem's staunchest opponents after his neoliberal turn. Menem's policy priorities were to control the rising cost of education through fiscal decentralization, which the union opposed. In 1978, the military had decentralized primary education to the provinces. Yet by 1987, 45 percent of secondary and 27 percent of technical schools remained in the hands of the national government (Murillo 2001, 164; Tiramonti 1994). Menem completed the work begun by the military regime by devolving control over secondary schools and private schools that received state subsidies to the provinces (Legarralde and Perazza 2008, 17). Decentralization aimed to align provincial expenditures on education with provincial revenues, so that the national government would no longer have to bail out provincial governments that were unable to cover the costs of their education expenses.<sup>18</sup> In 1993, Menem passed the Federal Law of Education despite sharp union opposition, which forced provincial governments to invest their own resources in public schools (Murillo 1999; Falletti 2010; Corrales 2004). Although Menem's administration sought municipal-level decentralization, union resistance pushed decentralization up to the provincial level.

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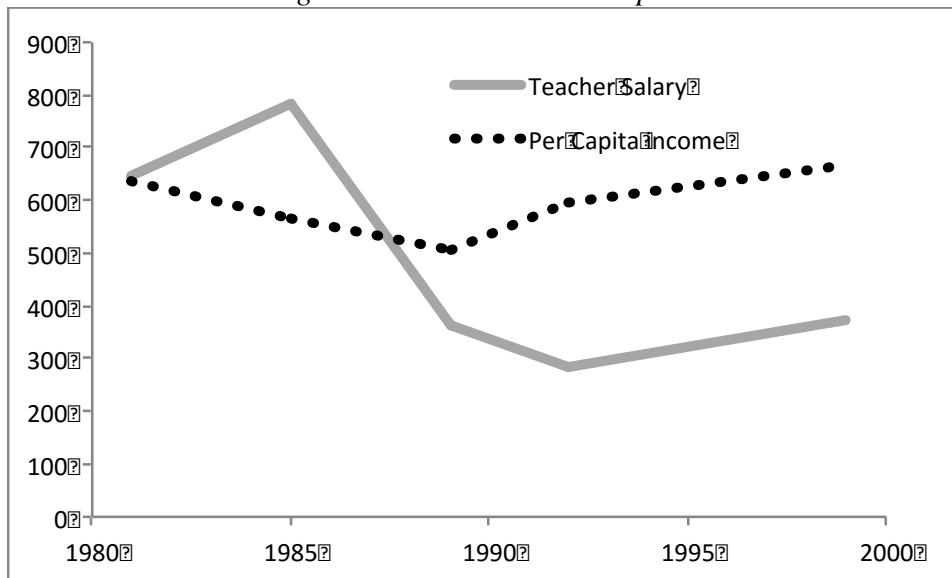
<sup>17</sup> In the short term, these policies stabilized the Argentine economy; hyperinflation was tamed and capital flight was halted. Economic growth rebounded during the 1990s. However, by the late 1990s these policies became unsustainable. Eventually they forced Argentina to devalue its currency and default on its debt obligations, prompting a major financial crisis in 2001.

<sup>18</sup> Ironically, when Menem was the governor of the province of La Rioja (1983-89), he had hired large numbers of public servants and teachers, which exacerbated problems of paying public servants adequate wages and paying their salaries on time. "Between 1983 and 1989, when current President Carlos Menem served as governor of La Rioja, the number of public employees in the province rose from 12,000 to more than 40,000, out of an economically active population numbering only 67,370. According to a report in *The Economist*, 'many of these employees have nothing to do. There are schools with more teachers than students, and the halls of government buildings are packed with salaried loungers'" (McGuire 1996, 140).

This decentralization law sparked conflict between the teachers' union and Menem's government. CTERA and other teachers' unions were concerned, rightly, that poor provinces lacked the requisite resources necessary to sustain the teacher payroll. As Figure 4 shows, teacher salaries fell significantly after 1990, relative to per capita income. Throughout the 1990s teacher salaries remained low, and the decentralization reform in 1992 exacerbated this problem (Rivas et al 2010, 41). Provincial governments lacked the resources needed to pay teacher salaries, and often paid salaries late in order to balance their budgets. In addition to the overall decline in teacher salaries, decentralization also increased wage inequality across provinces. Teachers in poorer provinces earned significantly less than their counterparts in wealthier provinces. In sum, Menem's education policies imposed significant hardship onto all teachers.

**Figure 4**

*Teacher Salaries in Argentina vs. Income Per Capita*



Source: Rivas et al 2010, 41

Menem's decentralization policy prompted protests by CTERA, which Menem managed with sticks. Decentralization was imposed on the union, not negotiated (Murillo 2001, 152), and Menem threatened to deduct the pay of teachers who participated in protests, and even to fire them. These were harsh policies, and they spooked many union members. Although these measures failed to prevent teacher protests, the level of teacher participation in protests did decline (Interview November 16, 2012).

Because of the fragmented field of teacher labor organizations, Menem played one union off against another. The government divided unions by selectively granting state subsidies and excluding opposition unions from negotiations. In 1989 Menem put UDA, the traditional Peronist teachers' union, in charge of administering social funds to teachers (e.g. the Social Fund (OSPALD) and *Caja Complementaria*, the fund for teacher retirement) (Nardacchione N.D., 18; Perazza and Legaralde 2008). Menem selectively favored pro-government unions: "CTERA routinely complained about government manipulation of union competition as [CTERA] rejected wage agreements reached by non-CTERA unions and defined different strike schedules"

(Murillo 2001, 166). CTERA was excluded from managing these social funds until the late 1990s. Menem only granted concessions to pro-government unions, while cracking down on oppositional unions like CTERA.

Menem's government exacerbated existing divisions within the teacher labor movement in two ways. First, decentralization reinforced CTERA's organization as a loose confederation of provincial unions. This law created an existential crisis for the national union leadership, since the federal government no longer set national standards for teacher salaries and teacher labor rights. After the decentralization law, the national executive committee of CTERA retained little influence, only overseeing teacher training and continuing teacher education (Perazza and Legarralde 2008, 21-22, 33). The lack of national level collective bargaining diminished the significance of CTERA's national executive committee. After the decentralization reform, the provincial leadership played a greater role in education policymaking.

Second, Menem effectively empowered left factions that were opposed to Peronism. His education decentralization abruptly halted CTERA's "Peronization" process, which had started in the 1980s. In 1991, CTERA withdrew from the Peronist labor central, the CGT, and supported the creation of the independent labor central, the CTA, a decision that provoked conflict in several provinces (Gindin 2011, 129). Peronist union leaders, such as CTERA Secretary General Mary Sanchez, joined the opposition Broad Front (*Frente Grande*). Opposition to Menem contributed to the emergence of a new generation of non-Peronist CTERA leaders, including CTERA Secretary General Marta Maffei (Intransigent Party) and Eduardo Macaluse (Independent). By alienating CTERA's Peronist union leadership, Menem's shift away from labor reinforced CTERA's multi-party identity. Had Menem forged an alliance with CTERA, the union might have been able to suppress dissident provincial leaders, and become a bulwark of Peronism. Instead, non-Peronist leaders were empowered by Menem's decision to take a hard line on CTERA.

Decentralization and the refusal to grant CTERA state subsidies reinforced the provincial character of the teachers' confederation, and strengthened non-Peronist union leaders. The provincial decentralization of education activated grassroots union dissidents and laid the groundwork for militant provincial union leaders to win power. By the late 1990s CTERA continued to possess a weak organization, since it had yet to receive state subsidies. Meanwhile, the regional divisions within the union leadership were exacerbated by the decentralization reform. Throughout the 1980s and 1990s, the union's incomplete political consolidation positioned it to engage in protest, but not to employ institutional channels to advocate for its members' interests.

### *The Limits of Political Action*

Divisions within the Argentine teachers' movement not only sparked teacher protests; they also limited the capacity of teachers to engage in political action. Protest and electoral mobilization have contradictory organizational underpinnings. The factional divisions and grassroots activism that underlay movementism militated against electoral mobilization. Union activists who were unresponsive to the official union leadership hindered collective action in the electoral arena. The inability of Argentine teachers' unions to mobilize their base from the top-



down proved a major impediment to political action. This section examines the organizational and institutional obstacles to political action. It then examines the union's short-lived electoral experiment in support of opposition parties.

### Organizational and Institutional Barriers

CTERA was founded as a fractured union movement, and after democratization the divisions among unions were reinforced. Recall that CTERA's project of union consolidation failed; there were multiple competing unions that continued to represent teachers, including CTERA, UDA, CEA, AMET, and SADOP. Each of these unions had a separate leadership structure and a distinct partisan orientation. Within a given province, competing unions divided teachers and prevented them from coalescing in the electoral arena.

CTERA, the largest teacher labor organization, had multiple partisan identities. Each provincial union developed its own, separate relationship to party politics. CTERA brought together union leaders who were Communists, Socialists, Peronists, and Radicals, and this fractured leadership was reproduced over time. Because of its confederated structure, CTERA's national executive committee was unable to orient the partisan identity of provincial affiliates. Therefore, the partisan identities of union leaders had a strong regional character. Affiliated unions were Peronist, Radical, leftist, or they had multiple divisions (Murillo and Ronconi 2004, 92-3). CTERA's efforts to forge political alliances generated a backlash from teachers who were aligned with a different party. CTERA lacked the capacity to aggregate teachers as a political force across territory.

The dominant faction within CTERA, the *Lista Celeste*, had limited electoral influence. Unlike dominant union factions in other countries, such as Mexico, the *Lista Celeste* was unable to serve as an electoral vehicle because it was not cohesive. The *Lista Celeste* controlled the national executive committee and many of the provincial unions, and sought to prevent small left groups from winning power through internal union elections. However, the *Lista Celeste* had a catchall identity, and supported different parties in different provinces. It came together in internal union elections, but split apart in legislative and presidential elections (Gindin 2011, 127).

In addition to leadership divisions, the union's weak organizational machinery also limited its role in the electoral arena. Teacher incorporation occurred late, and it left the union with few resources for top-down collective action. Teachers' unions in Argentina received few state subsidies. They were not granted control over bureaucratic, social welfare, and administrative functions for teachers. Perhaps the most important service that unions offered their members were teacher training and credential programs. Unions operated like private teacher colleges, which provided continuing education to teachers to help them advance up the salary scale (Interview November 2, 2012).<sup>19</sup> However, this service was not highly valued by teachers, nor was it provided exclusively through a single union, which meant it was not a strong

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<sup>19</sup> The national government enabled the union to participate in teacher training, and the union got contracts through the Federal Network of Continuing Teacher Training (Red Federal de Formación Docente Continua) (Legarralde and Perazza 2008, 19).

inducement to political participation. In general, Argentine teachers' unions played a less salient role in the daily lives of ordinary teachers, especially compared to Mexico. Lacking strong selective incentives, the union's political endorsements had little influence on teachers' voting behavior.

Institutional changes related to democratization itself also sustained the divisions within the Argentine teachers' movement. After the repressive military regime, the return to democracy in 1983 brought back an electoral system that regionalized politics. The 1853 constitution, which sought to balance the political influence of the Buenos Aires metropolitan area with small, peripheral provinces, was reinstated in 1983 (Munck 1998, Ch. 6; Gibson and Calvo 2000). National deputies and senators were elected in provincial electoral districts through closed party lists. There were low barriers to forming a new party, since only 0.0004 percent of registered provincial voters were needed to officially register a party. Still, new parties faced high barriers to winning legislative seats because the district magnitude, or the number of legislative seats in a given provincial district that were up for election, was low (Jones 2008, 43). For National Deputies in the lower house, the number of seats in a given provincial district was proportional to the population, and the median and mean district magnitudes were 3 and 5, respectively (Jones 2008, 42). District magnitude was even lower for the Senate; every province elected three Senators and one senator stood for election in each electoral cycle. The Senate disproportionately represented small provinces and was significantly mal-apportioned (Gibson and Calvo 2000).

These electoral rules reinforced political divisions among teachers and limited the union's role in electoral politics. The Argentine electoral system strengthened party branch organizations, which utilized regional clientelistic networks to mobilize their base. The primary actors were provincial party bosses, who controlled access to closed party lists: voters only cast a vote for a party, and they have no ability to support specific candidates. Party bosses also distributed campaign resources. Because of closed party lists, legislators were "party loyalists" who were accountable to party bosses (Jones 2008, 42). Legislative candidates were selected because they had broad appeal within a given province. This electoral system relegated interest organizations to a secondary role in electoral mobilization (Jones 2008, 47-51). Politicians would first secure the support of professional political brokers, *punteros*, and only later turn to "organized groups with an ability to organize large numbers of people" (50). Union leaders needed to forge an alliance with a regional party branch, and then pivot towards a regional coalition. Because of the regional electoral rules, union leaders who became politicians needed to mobilize non-teacher voters.

Placing Argentina's electoral rules in comparative perspective helps to shed light on the divisions they created among Argentine teachers. In Mexico, electoral rules unified the union leadership. Mexico had a mixed electoral system; the national legislature was elected through both single-member districts within each state (*uninominal*) but also a single, national district with proportional representation (*plurinominal*). The single, national district, in which district magnitude was high (M=200), set the threshold for securing political representation at 2 percent of the *national* electorate. The Mexican union became a successful small party by targeting teachers as voters across territory and converting the union organization into electoral machinery. In Mexico, electoral rules brought union leaders and teachers together in the electoral arena.

Argentina had a very different electoral system. The absence of an at-large, national district with a large district magnitude hindered the coordination of teachers as voters by preventing union leaders from launching teacher-based parties or electoral vehicles. Electoral rules did not provide any direct pathways for the teachers' union to get its own electoral representation; instead union leaders were dependent on party leaders to access public office. Even in the largest provinces with the highest district magnitudes, namely the Province of Buenos Aires, the City of Buenos Aires, and Santa Fe, the number of votes needed to register a new party and secure at least one legislative seat vastly exceeded the number of unionized teachers. For example, in the 2013 legislative election in the Province of Buenos Aires the smallest list that secured at least one seat won 449,450 votes; by contrast the teachers' union of the Province of Buenos Aires, SUTEBA, boasted merely 80,000 members. Union leaders who became political candidates needed to move away from the union and develop close ties to regional party organizations, in order to secure a favorable position on closed party lists.

In sum, divisions in the union, which stem from the union's founding and electoral rules, undermined the union's capacity for political action. The divisions within the teacher movement prevented the union from sustaining a teacher voting-bloc. Teachers' unions consistently organized small-scale collective action (i.e. protests), but not large-scale collective action (i.e. electoral mobilization). Moreover the electoral system compounded the divisions within the teacher movement. Teachers were disaggregated by the union's organizational structure and electoral rules, which separated teachers into a large number of small, territorially differentiated, voting blocs.

#### Short-Lived Support for Opposition Parties

Leaders of Argentine teachers' union did experiment with electoral participation, but only for a short period of time. In 1992, Menem's unpopular education decentralization reform prompted broad-based teacher opposition, which enabled teachers to overcome their partisan differences. The union supported a prominent opposition party, the Broad Front (*Frente Grande*), a center-left party founded in 1993 that articulated opposition to Menem's neoliberal reforms (Abal Medina 2009). In 1999, the Broad Front was reconstituted as FREPASO, which continued to sustain broad support among teachers. There was a political moment when a neoliberal government brought teachers with diverse partisan identities together in the electoral arena.

Charismatic union leaders also helped to bring teachers together during this period. Prominent union leaders, including Peronist Mary Sanchez, Secretary General of CTERA, joined the Broad Front. The next Secretary General of CTERA, Marta Maffei, and another prominent leader on CTERA's national executive committee, Eduardo Macaluse, were recruited to FREPASO. All of these candidates made strong appeals to teachers, and they had reputations for organizing successful teacher protests (Interview December 6, 2012). Charismatic leaders that claimed credit for defending teachers' labor rights had some capacity to organize teachers into a voting bloc. Teacher protests elevated the leadership profile of union leaders and position them to become political candidates.

Politicians who came out of CTERA purported to represent the interests of teachers. For example, Mary Sanchez helped to negotiate the National Fund for Teacher Incentive in 1999, articulating the interests of the White Tent protesters in the national legislature. Union leaders who entered public office sponsored education legislation and sat on education committees. During the late 1990s, there was communication between former union leaders in the national legislature and CTERA's national executive committee. Union leaders in the national legislature advocated on behalf of teachers' labor rights, voiced their solidarity for teacher protests, and participate in union rallies.

But this electoral experiment generated tensions within the union. Union leaders who became politicians were not "group delegates" of teachers; instead they responded primarily to party leaders. While they tried to elevate public education as a political issue, they also became involved in a number of other issues, such as gender rights, the environment, and human rights. Increasingly former CTERA leaders appealed to a broad, provincial constituency and moved away from representing teachers. As a consequence, their support within the union declined dramatically, as teacher issues became only of secondary concern. CTERA leaders repeatedly described former CTERA leaders in congress, such as Marta Maffei, as "disappearing" from the union, and becoming more loyal to the party leaders that recruited them into politics (Interview, November 30, 2012). Table 10, which provides data on CTERA leaders who became National Deputies, shows that there was no uniform partisan path into politics from the union, in contrast to Mexico and Colombia. Union leaders used different party vehicles depending on which province they were in, and they responded to different party bosses.

**Table 10***Former CTERA Leaders who Became National Deputies*

	<b>Years</b>	<b>Position in the union</b>	<b>Political party</b>	<b>District</b>
Delia Bisutti	2005-2009	Sec. Gen. UTE	ARI, Sol. e Igualdad	Buenos Aires (Cd.)
Alfredo Bravo	1991-2003	Sec. Gen. CTERA	Socialista, Alianza	Buenos Aires (Cd.)
Jorge Cardelli	2011-2015	Sec. Gen. UNRC; Dir. CTERA	Mov. Proyecto Sur	Buenos Aires (Cd.)
Eduardo Macaluse	1999-2011	Leader of SUTEBA, CTERA	Alianza, Coal. Civica	Buenos Aires (Pr.)
Marta Maffei	2003-2007	Sec. Gen. CTERA	ARI	Buenos Aires (Pr.)
Mary Sanchez	1995-1999	Sec. Gen. CTERA	Frente Grande	Buenos Aires (Pr.)
Horacio Piemonte	2009-2013	Leader SUTEBA	ARI	Buenos Aires (Pr.)
Elsa Quiroz	1999-2011	Leader SUTEBA	ARI, Coalicion Civica	Buenos Aires (Pr.)
Mabel Marelli	1997-2001	Leader CTERA	UCR, Alianza	Misiones
Marilú Leverberg	2007-2015	Sec. Gen. UDPM	FPV	Misiones
Carmen Nebreda	2009-2013	Sec. Gen. UEPC	FPV	Córdoba
Antonio Riestra	2011-2015	Leader AMSAFE, CTERA	Pares	Santa Fe
Verónica Benas	2007-2011	Leader AMSAFE, CTERA	Pares	Santa Fe
Nélida Belous	2007-2011	Sec. Gen. SUTEF	Social Protagónico	Tierra del Fuego

Source: Author's data

In addition, CTERA leaders who became politicians did not use the union as their electoral machinery. Instead, they relied on party organizations to set up campaign events. Initially, teachers helped to propel union leaders into public office, but after entering public office, union leaders subsequently relied on parties, not teachers, to target provincial voters (Interview November 21, 2012). Over time, union-based politicians lost their influence over cadres within the union and teachers became less responsive to their appeals. Union leaders avoided involving the union in their electoral campaigns (Interviews, November 16 and 21, 2012). One former union leader who became a National Deputy described the union's role in his campaign as follows:

We tried not to involve the union in my political campaign. We did meet with teachers but not through the union. I don't think it's good to involve the union in party politics. I think it's good for teachers to be politically involved ... but I disagree with bringing the union into a political party, because this creates internal divisions within the union and

distrust of the representatives... it creates the possibility that the whole union will become erroneously associated with a small group of people (Interview November 16, 2012 Buenos Aires).

Unlike union leaders in Mexico, union leaders in Argentina sought to avoid politicizing the union. Instead they relied on the parties that recruited them into politics as the basis for voter mobilization.

The territorial scope of CTERA's electoral experiment was also restricted. While the union leadership came to support the Broad Front and later FREPASO, the Broad Front was unable to make significant progress outside of the Buenos Aires metropolitan area (Abal Medina 2009; Lupu 2016). The rest of the union factions remained embedded within their own logics of provincial politics. Because each province operated independently, there was no way for CTERA to coordinate its political support across provinces. Leaders from CTERA's national executive committee became candidates in the City of Buenos Aires and the Province of Buenos Aires, but they were unable to bring along other provincial unions. The union never established organic ties to either the Broad Front or FREPASO. Both parties were weak, and neither incorporated the union into their organizations.

The decision of center-left parties to forge alliances with the right also dispersed the nascent teacher voting-bloc that had initially formed around the Broad Front. Because the opposition parties that CTERA supported were too small to challenge Peronism on their own, their only option was to forge alliances with center-right parties, such as the Radical Party, in order to build a broader-based anti-Peronist coalition (Lupu 2016; Garay 2010, 58; Roberts 2014). An example of the type of opportunistic alliances forged between center-left and center-right parties took place in 1999, when FREPASO joined the Radicals in what became known as the Alliance (*Alianza*). These alliances among parties with incompatible programmatic agendas sharpened the cleavage between Peronist and non-Peronist teachers. Peronist and leftist teachers alike felt betrayed by center-left parties that cut deals with conservative politicians.

The union was then unable to sustain a teacher voting-bloc. Teachers only came together temporarily, when charismatic union leaders and an unpopular government helped teachers to overcome their entrenched partisan divisions. But after Menem's unpopular government, the union moved away from supporting candidates and parties in elections, even though parties continued to recruit former CTERA leaders as candidates. Teachers dissolved as a cohesive voting bloc when there was no unifying party that bridged the political divisions among teachers. Subsequent iterations of the Broad Front, namely FREPASO, Civic Coalition, and ARI, had increasingly weak linkages to the union. By the 2000s teachers reverted to their heterogeneous partisan identities.

In interviews, union leaders were reluctant to acknowledge their own partisan identities. For example, the influential union leaders Roberto Baradel and Hugo Yasky supported the party New Encounter (*Nuevo Encuentro*), a left party led by Martin Sabatella that was a coalition

partner of President Cristina Fernandez de Kirchner.<sup>20</sup> However, both were careful to distinguish their personal political views from those of their unions. In an interview, another high-level union leader said that the union campaigned against candidates it opposed, but not in favor of candidates that it supported (Interview November 14, 2012).

We told our base not to vote for Menem, but we haven't asked our base to go out and campaign for a given candidate... it would be looked down upon if CTERA, as a union, did this... we have never allied with a political campaign of any candidate, we have only mobilized against political options that were clearly anti public school.

Union leaders denied endorsing politicians. In Argentina, voting was an individual decision that each union leader and teacher made on their own, and party building activities were forbidden within the union. CTERA emphasized its boundaries from party politics and recognized the multiple partisan identities of teachers.

### *The Kirchner Moment and CTERA as an Unreliable Partner*

CTERA was unable to deliver non-electoral support in the form of strike restraint to a pro-labor government. CTERA's loose organizational structure created the conditions for teacher protests to be persistent. When labor unions have a centralized organizational structure, concertation and corporatist exchange are possible. Governments can negotiate with the leaders of centralized labor organizations and avoid labor conflict. The fragmented Argentine teachers' movement, however, was unable to engage in orderly negotiation (Murillo 2001). When governments responded to teacher demands, the teacher labor movement remained militant; it was unable to restrain its provincial affiliates and members' demands.

### The 2001 Crisis and the Pro-Labor Policy Response

Teacher protests festered before governments attempted a more permanent solution to the problem of teacher labor unrest. In 2001 and 2002, teacher protests took place in the context of contentious demand making from below by various groups. Labor unions, informal sector workers, and social movements ratcheted up contentious activities (Garay 2016; Collier and Etchemendy 2007).<sup>21</sup> The Alliance for Work, Justice and Education (*Alianza*) that supported President Fernando de la Rúa (of the center-right Radical party), quickly unraveled. As the Argentine peso collapsed because of the Convertibility plan, de la Rúa turned to violent repression of protests and imposed new austerity measures on education budgets (Lupu 2016). Austerity measures meant that teachers were paid late, or that they were given IOUs (e.g.

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<sup>20</sup> According to one high-ranking union leader, "I can be in *Nuevo Encuentro* to make myself strong in the political dispute. I take the position that we should build an alternative political expression that can support [the Kirchner government] but do so in a way that is critical. That is what pushes me to identify myself with *Nuevo Encuentro*." This quote shows how the union sought to simultaneously support the government, while also asserting its autonomy from it.

<sup>21</sup> Following the financial crisis of 2001, the national spotlight fell back on teachers. Like unemployed, informal sector workers, and *piqueteros*, teachers were also a group of excluded outsiders who demanded political recognition and labor rights. During the 1990s, teachers suffered a significant decline in wages and there was no institutional mechanism (e.g. collective bargaining) to resolve labor conflicts.

“*patacones*”) (Blanco and Migilivacca 2011, 150). Teachers experienced significant hardship during the financial crisis, and this hardship translated directly into labor unrest.

In the wake of the financial crisis, Argentine presidents seemed unable to stabilize the economy and govern. The deepening economic crisis and wave of protests created a situation of ungovernability, in which de la Rúa was forced to step down. The motto in the streets was “throw the bums out” (*que se vayan todos*) (Levitsky and Murillo 2003). Shortly thereafter de la Rúa was replaced by interim President Rodríguez Saa, who defaulted on the national debt and subsequently stepped down. Eduardo Duhalde (2002-2003), who served as interim president for one year, followed Rodríguez Saa. Duhalde significantly expanded social programs for the unemployed (Garay 2010, 66-8). Yet, for Duhalde, education reform remained a backburner issue; he prioritized more pressing national social and economic problems. Teacher unrest began to simmer especially in the province of Entre Ríos, where protests began to dramatically intensify (Suarez 2005). Governments responded to unemployed and informal sector workers before addressing the grievances of teachers (Garay 2010, 59).

After his narrow election in 2003, Néstor Kirchner, the little-known governor from the small province of Santa Cruz, courted labor unions, in general, and teachers’ unions, in particular (Collier and Etchemendy 2007). In 2003, the Kirchner government stepped in to help resolve the protracted labor conflict in Entre Ríos. The President and Education Minister, Daniel Filmus, went to the province and used national funds to pay teachers (Etchemendy 2011, 97-98). But after this national intervention and a labor agreement between the union and the provincial government, this labor agreement fell apart and teacher conflict in Entre Ríos resumed (Suarez 2005, 145-46). This intervention marked the start of a major policy shift that aimed to demobilize teacher protests.

Kirchner sought to establish a neo-corporatist relationship with the teachers’ union. The government of Néstor Kirchner fostered a close working relationship with Hugo Yasky, CTERA’s Secretary General. The broader national political context, in which a major economic shock put governments in a position to assuage popular unrest, created the conditions for teachers to be invited to join the governing coalition for the first time in the union’s history. President Néstor Kirchner negotiated with teachers in order to address the problems of governance that fueled teacher unrest. The Kirchner government made major policy concessions to the union and responded to CTERA’s historic demands for a national institution of collective bargaining.

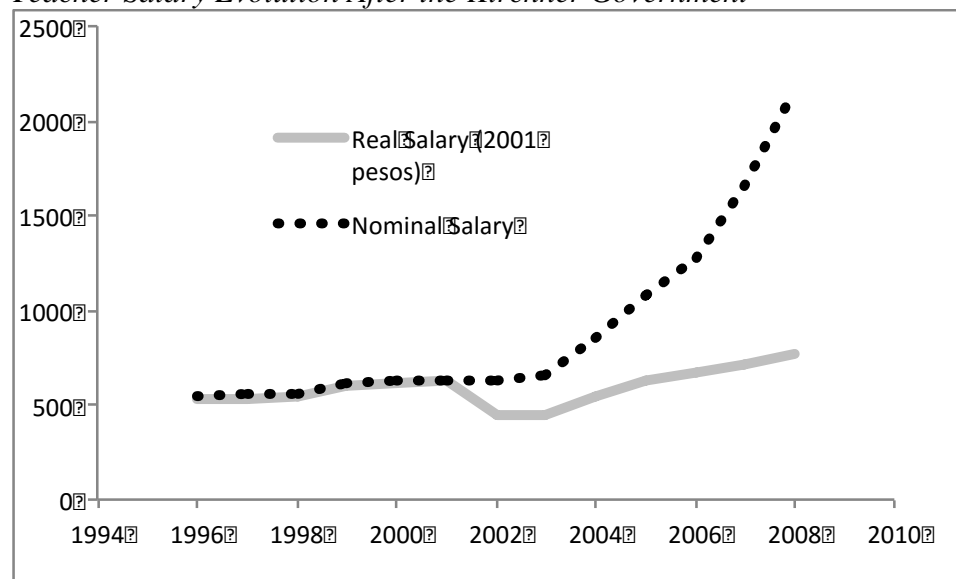
Education policy shifted dramatically in favor of teachers after 2003. Whereas the 2001 financial crisis hurt public sector workers who were subject to harsh austerity policies, the Kirchner government undid these measures and directed national resources towards education. The Law 25.864 of December 2003 guaranteed 180 days of class in schools across the nation. In 2004 a law (Law 25,919) set a minimum salary for all teachers across Argentina. In 2005, the Law of Education Finance set national education spending targets of 6 percent of GDP. These reforms signaled the government’s commitment to making public education a policy priority and to addressing the union’s longstanding grievances. Even militant sectors of the union acknowledged that they were a step in the right direction. There were real, significant gains in teacher wages after the Kirchner government came to power. Because of these measures,



between 2003 and 2009 real teacher salaries increased 40 percent, although overall, between 1996 and 2009 real salaries were flat (Figure 5) (Ministry of Education Argentina 2012).

**Figure 5**

*Teacher Salary Evolution After the Kirchner Government*



Source: Rivas et al 2010, 43

A landmark education law was passed in 2006 that addressed several of CTERA’s historical grievances. CTERA leaders played a direct role in writing key sections of this law, and they were included in the policy making process (Interviews November 16 and 21, 2012). In 2006 the National Law of Education reversed parts of the Federal Law of Education of Carlos Menem, and strengthened the role of the national government in education policymaking (Etchemendy 2011, 96). There was a nationalization of policy and a major effort to address teachers’ labor grievances. This law created the *Paritaria Nacional Docente* (PND), which enabled national level collective bargaining and strengthened CTERA’s national executive committee (Etchemendy 2011). Collective bargaining began in 2003 but this law formalized it. Kirchner offered considerable benefits to teachers, including improvements in teacher wages and increases in education spending. The terms of this alliance seemed quite favorable to teachers; indeed Etchemendy (2011) saw this relationship as an instance of “neo-corporatism.”

This trend of pro-teacher policies continued into the government of Cristina Fernandez de Kirchner. Fernandez de Kirchner addressed the grievances of Argentine teachers who resembled labor market outsiders; a large number of teachers had precarious working conditions because they held substitute or part-time teaching positions. They lacked a permanent position within a given school, and they did not enjoy the benefits of being a full-time, tenured teacher. In 2009 Cristina Fernandez de Kirchner made a national decree that incorporated a large number of part-time and substitute teachers, approximately 200,000 in total, onto the full-time teacher payroll (Chiappe 2012, 11). Throughout both Kirchner governments, then, there was a major expansion of pro-teacher policies that markedly improved teachers’ working conditions.

The election of Nestor Kirchner in 2003 marked an inflection point and set the stage for landmark pro-teacher legislation. Teachers recovered lost wages and joined the governing coalition. The new, pro-labor government created the conditions for labor unions and lower class organizations to be included in policymaking processes and to develop neo-corporatist relations with the government (Collier and Etchemendy 2007). These massive policy concessions to teachers seemed to create the conditions for a political realignment of teachers in favor of a pro-labor, Peronist government.

### Union Resistance to a Pro-Labor Government

The union did not serve as a reliable coalition partner to the Kirchner government, however. While in Mexico the teachers' union brokered an unlikely pact with a right-wing party, in Argentina the union had a difficult time brokering a deal even with a *pro-labor* government – a most-likely coalition partner. Whereas in Mexico union leaders delivered the union's support to their partisan allies, in Argentina union leaders were unable to restrain provincial opposition. To be sure, CTERA's national leadership did not organize strikes during the Kirchner government. They met with representatives from the government to try and make deals to improve teacher wages. But even when deals were reached, which was only occasionally, provincial unions showed almost no restraint. Militant and dissident groups remained as strong as ever. Despite the landmark labor law, the aggregate level of teacher protest actually increased after 2006.

There were several reasons why protests increased. The national collective bargaining institution (PND) involved a large number of actors. While it was purportedly a corporatist arrangement, there were a large number of actors on the government side and on the union side, all of whom needed to reach an agreement. Collective bargaining involved five different unions, the national minister of education, the national minister of finance, and provincial ministers of education. The fragmented structure of the teacher labor movement in Argentina made it difficult to reach deals, since different unions had different demands. According to the former minister of education, Juan Carlos Tedesco:

In the national collective bargaining institution (PND) five different union federations that all have different provincial organizations meet together. Therefore, this fragmentation, alongside the tendency to be more oppositional, makes the dialogue very difficult. Other countries do not have this problem. If you go to Mexico, despite all of the critiques of the Mexican teachers' union, which is extremely powerful in political and economic terms, it is united and it can solve problems... there is union machinery that enables deals to be reached, and these deals are more or less stable.<sup>22</sup>

The fragmented structure of the teacher movement in Argentina hindered the containment of teacher unrest. National agreements set non-binding "guidelines" or norms that governors followed or ignored. Hence while the national government tried to broker agreements that satisfied everyone, in practice this proved difficult.

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<sup>22</sup> See Gabriel Latorre. "Entrevista a Juan Carlos Tedesco sobre la Integración de TIC en la Educación Argentina." *Insurgencia Magisterial* April 9, 2016.

Militant groups within the union remained active, and were critical of the national-level collective bargaining. These groups felt that it provided only incremental improvements in teacher salaries (Blanco and Migilivacca 2011, 170-171). Collective bargaining between CTERA and the national government broke down with threats of teacher strikes. Even temporary agreements that were to last one year were difficult to achieve (Etchemendy 2011, 101-02). There was a significant gap between the union and the government's proposals for salary adjustments. The pressure from dissident and military groups continued. Because CTERA was only partially consolidated, it was unable to control the militant groups within its ranks.

The partisan divisions at the elite level, among union leaders, also hindered negotiation with the Kirchner government. National Deputies who became politicians through CTERA, such as Delia Bisutti, Marta Maffei, Eduardo Macaluse, and Elsa Quiroz, were from center-left parties that were opposed to the Peronist party. These leaders voted *against* the landmark National Education Law of 2006, despite the union's support for this law, citing programmatic objections to the law's policy design. National Deputies accused CTERA's pro-Kirchner leaders of inappropriately endorsing the Kirchner government; CTERA leaders appeared at the signing ceremony of this law, which resembled a campaign event. Meanwhile, CTERA leaders accused National Deputies, such as Maffei and Macaluse, of voting the party line, in opposition to the Kirchner government, while overlooking the substantial benefits that the law contained. At the elite level, there were union leaders who did not want to cut a deal with the Kirchner government.

The internal logic of the union did not lend itself to stable partisan alliances or corporatist exchange. Because power was dispersed within the union, it was impossible to restrain and discipline provincial unions. CTERA's Secretary General lacked unilateral, discretionary power; decisions were made through deliberation with provincial union leaders. This deliberative model was quite different from the hierarchical, top-down structures in other Argentine unions. Corporatist exchanges only work when societal groups are hierarchical, centralized, and encompassing, instead of being internally divided and competing (Regini 1984, 128-31; Hall 1986). Because of the internal divisions with the teacher labor movement, corporatist arrangements had significant limitations. The federalized organization of CTERA severely limited corporatist exchange.

This landmark law then failed to demobilize teacher protests. Leaders of CTERA delivered only limited and indirect support to the Kirchner government; they sought to avoid criticisms of cooptation. CTERA leaders quietly voiced their support for the Kirchner government, but they recognized that there were pockets of hostility towards the Kirchners among their base (Interview November 14, 2012). Provincial teacher strikes and discontent continued. Provincial unions rejected the national level accords reached between CTERA and the government and continued to protest (Etchemendy 2011; Chiappe and Spaltenberg 2010).

National union leaders were unwilling to urge restraint on the part of provincial unions. They instead defended the right of provincial unions to respond to the demands of their base. Former government officials felt frustrated with national union leaders; even though teacher wages improved steadily from 2003 to 2010, teachers continued to complain about their working conditions and protest. Critics of the union suggested that this appeasement of the union only

fostered more bad behavior. The Argentine union maintained its movementist character despite landmark labor laws to resolve labor conflict through collective bargaining. The union's oppositional identity remained its defining feature, and teachers remained one of the most restive sectors of labor in Argentina.

### *Conclusion*

This chapter has demonstrated the political significance of organizational structures. In Argentina the union had a fragmented organization and a divided leadership, which made it movementist. The fragmented organization prevented the union from mobilizing its base en masse from the top-down. Instead, teachers were organized into separate unions. The largest teachers' union, CTERA, had limited organizational resources, which prevented it from mobilizing teachers from the top-down. When the union experimented with supporting opposition parties during the 1990s, it lacked the organizational resources to consistently deliver its base to them. Organizational weakness meant that electoral mobilization was not an effective strategy. Meanwhile organizational fragmentation enabled a group of dissident activists to establish themselves, reinforcing the de-concentration of power within the union. These groups resisted the formal union leadership, and organized their own protests and contentious actions.

The Argentine case demonstrates how divisions within CTERA's leadership undermined a political alliance with a pro-labor government. Partisan and factional divisions prevented the union leadership from taking strategic action. Power relations within CTERA were "complex" and the union suffered from "structural tensions" (Perazza and Legaralde 2008, 13). During the 2000s, Argentine voters shifted toward the left and elected Nestor Kirchner president. The Kirchner government made concerted efforts to forge an alliance with the teachers' union and to demobilize teacher protests. It even negotiated a landmark education law with the teachers' union that increased the national government's role in education financing, boosted education spending, and established national-level collective bargaining. Yet, even these generous concessions failed to transform the teachers' union into a political ally. The deep divisions within the leadership prevented the union from endorsing a pro-labor government, and maintained the union's oppositional identity. Leadership divisions constrained negotiations with the government, and prevented national leaders from restraining teacher demands and demobilizing provincial protests.

The outcome of organizational fragmentation and leadership divisions was movementism. Protests were a consistent attribute of teacher mobilization, while electoral mobilization occurred only intermittently, and with minimal success. Teacher protests became a routine part of political life in Argentina, and an essential feature of education politics. Militant union leaders organized contentious actions, while grassroots activists mobilized spontaneous protests, with little regard for the disruption these protests caused. Militant and dissident groups put pressure on the official union leadership, thereby prompting large-scale protests at both the provincial and national levels. Protests even continued after a pro-labor government offered teachers major improvements in wages. Although, some union leaders became politicians, they did so independently of the union. The union did not provide these leaders with a consistent base of political support, which hindered their political ambitions.



## Chapter 5: Leftism in Colombia

Teachers in Colombia were incorporated into left parties through their union. Democratic reforms in the 1980s and 1990s set in motion the alignment of the Colombian Federation of Educators (FECODE) and the left. During the 1970s, the union leadership moved leftward, but rank-and-file teachers remained rooted in the traditional parties. After FECODE's failed electoral incursion in 1970, under the banner of a faction of the Liberal party (the Movement of Education Action, MODAE), the union used protests to articulate its interests. By the 1990s, left parties intensified their organizing efforts through the union, shoring up their political organizations. FECODE endorsed these parties and mobilized organizational resources for them. The union had pivoted away from protests, and begun to articulate its interests via elected representatives.

Democratizing reforms during the 1990s, I argue, transformed the union's organization and its leadership. These reforms included societal actors. For teachers, new education and labor laws that were adopted shortly after the ratification of a new constitution strengthened the union organization. These laws set the stage for the union's expanded electoral role. Previously, the National Front regime (1958-1974) did not recognize the union as a legitimate political actor, and it refused to delegate social welfare programs to it. The democratic opening, which was symbolized by the Constitution of 1991, prompted the state to treat the union as the official representative of teachers and to subsidize it in new ways. The inclusion of FECODE in the policy-making process strengthened its organizational apparatus. The union absorbed an influx of resources and took on new welfare functions. This enabled the mobilization of its member base as a voting bloc.

Democratic reforms also transformed the union leadership. The political opening legalized left parties, while also lowering the barriers to achieving representation in the national legislature. These changes were the result of a new electoral law, which positioned societal groups, i.e., public school teachers, among others, to send "group delegates" into public office (Morganstern and Siavelis 2008, 23). The electoral rules transformed union factions into competitive electoral vehicles that won legislative seats, most notably in the Senate of the Republic. Multiple factions consolidated, because each was sufficiently large to become a stand-alone electoral vehicle. Democratic reforms enabled the left to make new appeals to teachers. This meant that multiple left factions organized vigorously, and persuaded large numbers of teachers to support them in elections.

This chapter begins by laying out the dimensions along which the Colombian union was aligned with the left. It then traces how democratic reform transformed FECODE's organization, focusing on new subsidies and state recognition. It goes on to examine how a new electoral law strengthened left factions and divided the union leadership. The next section shows how the union became politicized, focusing on the appropriation of union resources for political ends and the ensuing factional conflict. Finally, it examines how the partisan identity of the union became institutionalized. Several union leaders embraced a more pragmatic, instrumental strategy, but they failed to change the union's ties to ideological parties. Finally, the fact that the traditional parties embraced neoliberal education policies prompted opposition, and undermined teacher support for these parties. Meanwhile left parties embraced progressive education policies, which teachers strongly supported. By the mid-2000s, teachers had cemented their position in the left.

## *Teachers and the Left Align*

The Colombian teachers' federation aligned closely with left parties. The ties between FECODE and the left resembled the relationship that Collier and Handlin describe between industrial unions and labor-based parties: unions integrated into political parties “through formal organizational links, interlocking leadership, or close coordination, as well as through a history of electoral mobilization and political socialization” (2009, 49). Similarly, left parties and FECODE were interpenetrated, and they developed a symbiotic relationship. Over time, it became difficult to identify the boundaries that separated the former from the latter. This identification with the left was discernable along three dimensions: (1) the partisan character of teacher protests, (2) political influence in the union leadership, and (3) teacher voting pattern.

### The Partisan Character of Protests

The protests that teachers organized in Colombia reflected the partisan influence of the left. In Argentina, protests had more of a social movement character. They reflected bottom-up, grassroots mobilizing, and they occurred in a spontaneous fashion. By contrast, in Colombia, protests were organized from the top-down, and involved more planning. The national union leadership called protests, and mobilized teachers through party organizations. Protests reflected the interests of these parties, who sought to recruit new members.

The union mobilizing structure was hierarchical and top-down. The leadership ordered union activists to circulate official memorandums declaring work stoppages. Ordinary teachers followed the directives of the leadership and participated in these stoppages. Protests revolved around fiery speeches by union leaders, who made ideological demands that were directed at co-partisans. National and local union leaders played a prominent role in various forms of protest: marches, occupations of public spaces, and demonstrations in front of government buildings. Union leaders who hailed from left parties made an indelible mark on teacher protests.

The demands that the union articulated expressed the program of left parties. While union leaders invoked bread-and-butter issues, such as higher teacher wages in order to appeal to the rank and file, they framed these demands in terms of a broader political struggle against neoliberalism. For example, union leaders directed blame at politicians from the traditional parties, who were accused of privatizing public education. Union leaders denounced new programs that expanded charter schools and created public partnerships with private schools, even though these programs were small and did not have a direct effect on the economic well-being of public school teachers. Teachers had tenure and they were not in danger of losing their jobs. The privatization of public education was an attractive slogan for left parties, but it was a hyperbolic and misleading way to characterize education policy. Nevertheless, protests featured this kind of militant rhetoric. The ideological language used during protests went beyond the bread-and-butter concerns of ordinary teachers, and aimed to energize militant party activists.

While social movement unions used protests to influence public opinion, unions like FECODE used them as a political organizing strategy. The Argentine union utilized creative communication tactics in an effort to win public support for the struggle for labor rights. By

contrast, in Colombia left groups used protests to organize their party base, while they made little effort to influence public opinion. They also showed little interest in joining forces with other societal groups. Colombian teachers often demonstrated on their own because other groups refused to march with them in solidarity. Teacher protests defended the status quo. They aimed to protect existing education laws from more technocratic policies (Lopez 2008, 45). Union leaders used protests to advance partisan interests and to defend the existing education model, rather than to radically transform public education.

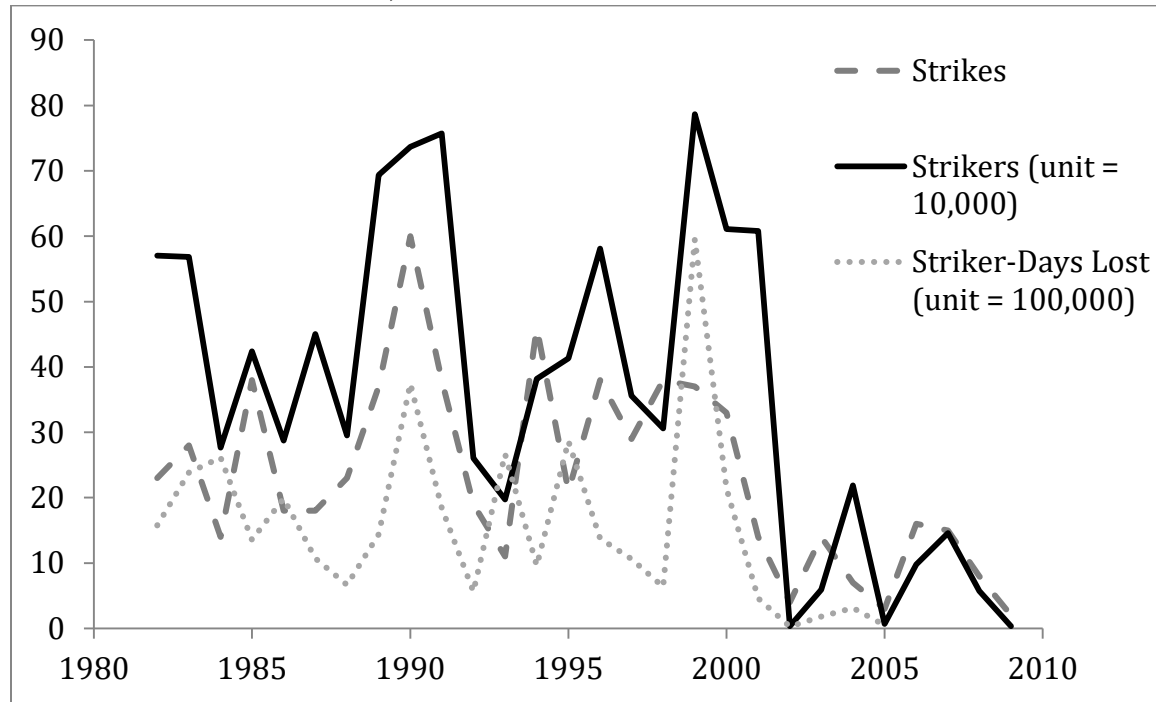
Over time, left parties in Colombia shifted their strategies away from contentious politics. They developed new approaches for recruiting members and building organizations, and protests declined as a consequence. During the 1980s, left parties resided in the opposition; they had only started to organize in the electoral arena. As a result, left-leaning union leaders relied on protests as a means to strengthen their party organizations. Protests elevated the salience of small parties, giving them a platform for making a statement. It also gave them an opportunity to flex their organizational muscles and recruit new members. CINEP, a Colombian think tank that coded social mobilizations, found that teachers organized 24% of worker protests from 1975 to 2000, a proportion that puts Colombian teachers in line with their Argentine counterparts (Lopez 2008, 26). When left parties lacked political representation, they frequently organized protests as a means to advance their partisan interests.

During the 2000s, left parties entered politics, and turned away from contentious activities. These parties found new ways to build their organizations. By this time, they had substantially increased their political representation, and protests were of declining importance. After 2001, teacher protests fell dramatically relative to previous decades. Data from CINEP shows that three key indicators of protest intensity underwent a precipitous decline, the number of strikes organized, strikers, and workdays lost (Figure 6). In 2009, when this data series ends, interviews with union leaders confirmed that teacher strikes remained small and infrequent in 2010, 2011, 2012, and beyond. As the strategies of left parties changed, the union moved away from protest.



**Figure 6**

*Teachers Strikes in Colombia, 1982-2009*



Source: *CINEP Social Movements Database*, Strikers: 1982-2009; Strikes and Striker-Workdays Lost: 1982-2005

Teacher protests were fundamentally connected to the strategies of left parties. As the left entered the political arena, FECODE represented teacher interests through political representatives. Left parties began to mature. They had already established themselves as viable political organizations that could reliably mobilize a chunk of the electorate. They no longer needed protests to raise their profile and recruit new members. As the left moved into the electoral arena, the contentious practices of FECODE became less relevant.

#### Political Influence in the Union Leadership

The influence of left parties is readily observable in FECODE's leadership. The left established itself at different points in time. In the 1970s, left parties that had international support from China (i.e. Maoists), the USSR (i.e. Communists), and Cuba consolidated influence. In the 1990s, a group that called itself the "Social Democrats," because it received solidarity aid from the Labor Party in Sweden, became a dominant force, although this group's program only loosely resembled that of its Swedish counterparts. During this latter period, new factions also emerged, among them splinter groups that had formerly been part of the Social Democrats, and groups organized by charismatic leaders who had defected from the Maoists and Communists, such as "Democratic Unity." The union served as a transmission belt for multiple left parties.

Partisan influence was established through the procedures used to select union leaders. In the 1970s, left parties won power through national labor congresses, in which teachers in departments voted for union delegates, who then participated in national labor conventions. Delegates at these conventions negotiated the number of leadership positions that each party would receive. These conventions could devolve into a rowdy affair, in which rival groups resorted to verbal altercations and fisticuffs, as occurred in the 1982 XII Congress of FECODE. The rowdiness was related to the high-stakes negotiations between groups. Left parties relied on the union for their political survival, since they were banned from participating in elections for public office (Gómez-Buendía and Losada-Lora 1984, 200-08). The left initially won influence by organizing and negotiation positions through labor congresses.

However, labor congresses produced tenuous ties between leaders and the rank and file. The democratic opening of 1991 contributed to a major shift in the procedures used to elect union leaders. In 1993, FECODE adopted direct elections for its leadership positions: (a) the national executive committee, (b) departmental committees, as well as (c) financial cooperatives for teachers. Union elections were organized and monitored by the union itself. Without independent observers, questions were raised about the fairness and transparency of these elections. Nevertheless, a large number of teachers participated in them. For the national executive committee, FECODE members in all departments of Colombia voted for union candidates. The candidates that won the 15 highest vote-shares received leadership positions. Union leaders were elected every three years, and they stepped down after two terms (Lopez 2008, 18). Such rules enabled multiple parties to compete for influence, since in a typical election 30 candidates ran for 15 positions, thus dividing teachers into small voting segments.

Direct elections for FECODE's executive committee entrenched the influence of left factions. The barriers to entering the national executive committee were low, and typically about 4,500 votes were needed to win a position. This prompted left parties to invest time, energy, and financial resources in order to shore up and expand their influence. Left parties that achieved representation in state institutions, namely the national legislature, received access to new resources, and invested them in union elections. For instance, Senators had discretionary resources to cover the costs of constituency services, travel, staff, and political campaigns (e.g. *gastos de representacion, dinero de plantilla*). They used them on behalf of co-partisans, to subsidize the costs of campaigning in FECODE elections. Senators sent staff from their legislative offices with political expertise and a small fleet of vehicles to access far-flung municipalities. Campaigns for leadership positions became expensive and professional; they increasingly mimicked campaigns for public office.

The union developed an interlocking leadership with left parties. Union leaders identified with these parties because they anticipated using them to move into public office. Union elections served as a dress rehearsal. They became a barometer for gauging the level of support left parties could muster in legislative elections, and an opportunity to practice running a political campaign. Union leaders became accountable to the parties that helped them to win a position in the union, rather than to rank and file teachers. A new chain of command developed. Left-leaning politicians, and Senators in particular, became political patrons, and union leaders operated as their brokers. Every member of the national executive committee was identifiable based on the faction, or political grouping, they represented. The structure of representation

resembled a “cartel party” described by Katz and Mair (1995), since state resources determined access to union leadership positions.

### Voting Patterns of Union Members

The voting behavior of union members demonstrates strong support for the left. Left parties successfully persuaded large numbers of teachers to vote for them. This was not a foregone conclusion. During the 1980s, the teaching profession had ties to the traditional parties, especially in rural departments, such as Nariño and Sucre, where regional bosses influenced teacher hiring, transfers, and promotions (Duarte 2003). When the left won leadership positions through national labor congresses in the 1970s and 1980s, as discussed above, it had weak ties to rank and file teachers. Analysts suggested that the union leadership did not represent rank and file members. Lowden (2004, 353) describes union leaders as “being highly ideological (and Marxist), in complete contrast to the vast majority of the membership.” Montenegro (1995) describes the union leadership as follows.

In the past, some of FECODE's leaders were involved with extremist and guerrilla organizations, and, almost without exception, they possess simplistic and outdated political ideas ... How does a small group of ultra-leftists control and lead 200,000 conventional, middle-class people — most of them members of the traditional political parties — such as the average Colombian teacher?

During the 1980s and early 1990s, the ideology of the leadership tilted to the left, and it seemed to not reflect that of rank and file teachers.

In 1993, after FECODE implemented direct elections for leadership positions, the left established strong ties to union members. Eliminating labor congresses induced union leaders to interact more with ordinary teachers, and to make targeted appeals to them. Direct elections gave leaders a democratic mandate to represent teachers. These elections influenced the political attitudes of Colombian teachers, who largely supported the program of left parties. In a survey of teachers conducted in Bogota in 2009, 90% of respondents opposed the privatization of public enterprises, and 38% agreed with the statement that armed rebellion was justified due to the government’s indifference to poverty (Londono et al 2011, 197-209). On key policy issues, survey evidence suggests that teachers were squarely aligned with the left. It became increasingly difficult to defend the claim that the left-leaning union leadership did not represent the views of ordinary teachers.

By 2006, there is evidence that teachers were voting in large numbers for left parties. Teachers were disaffected with the traditional parties, which had neglected education issues, and the left was a viable alternative. One legislative aid described the logic of supporting a union leader from a left party who ran for public office as follows (Interview Bogota, June 20, 2012):

Teachers said, instead of voting for a Liberal or a Conservative, the people who don’t listen to us, it is better to vote for one of our *compañeros* [from FECODE] who will do something for us.

In multiple interviews, union leaders and politicians reported that teachers were a voting-bloc for the left. Teachers followed the direction of the union leadership, and sought political representation through left parties. These parties made a strong push to win teacher support, in contrast to the traditional parties.

Precise estimates of the number of teachers who voted for left parties differed. Obviously, the union was not a monolithic voting bloc that mobilized in lock step. Still, even cautious estimates, which suggest that only half of teachers voted for the left, demonstrate significant support. According to one former Senator who had been a leader of the teachers' union:

Today 50% of teachers are friends of the leaders of the traditional parties in Colombia. If you were to measure the voting behavior of teachers you could say that 150,000 [of 300,000] vote for leaders who are on the left, be they from the Democratic Pole, Communists, Progressives, the Green Party, or from another left party. (Interview Bogota, Colombia July 29, 2013)

The teacher voting-bloc looked different in big cities compared to the rural periphery. Urban teachers, who had university education, greater political rights, and more contact with other unionized workers, were more likely to be left partisans. Meanwhile rural teachers, who only had secondary education, more tenuous political rights, and had more involvement in clientelistic networks, were more likely to support the traditional parties. There was segmentation among teachers with regard to their political ideology.

Still, teachers had a strong tendency to support left parties. This was apparent in internal union elections. Turnout was high, especially given the fact that turnout in elections for most labor organizations is typically very low. For FECODE's national executive committee 131,000 votes were cast in 2002; 136,000 in 2008; 129,000 in 2011; and 153,000 in 2013. FECODE had approximately 270,000 members. Support for left-leaning union leaders was overwhelming. Left candidates, as a group, achieved super majorities. According to Table 11, at least 90% of electoral support went to parties of the left.<sup>23</sup> The Communist and Maoist parties had the most consistent representation. New factions, such as the Social Democrats and Democratic Unity gained influence, and also articulated leftist positions. The composition of the national executive committee shows tremendous representation for left parties.

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<sup>23</sup> The only non-leftist parties that won leadership positions were the Liberal party, which retained support in the department of Antioquia, and Citizen's Convergence, a group that was on the right, and held the department of Santander. The rest of the factions were on the left.

**Table 11**

*Left Representation in National Executive Committee*

	Number of Positions for Left	Percent of Positions for Left	Votes for Left	Percent Votes for Left
1993	13	87		
1997	14	93		
2002	13	87	117,494	90
2005	14	93		
2008	14	93	136,348	96
2011	13	87	128,948	93

Source: Author's data

Teacher support for left parties is also discernable in the vote shares of Senators who made targeted appeals to teachers. All of these Senators originally came from left parties.<sup>24</sup> Former FECODE leaders who represented teachers became a significant legislative bloc. All but one of these Senators, Jorge Robledo of the Maoist party, was a former leader of FECODE. Figure 7 and Table 12 show the vote share of Senators who had strong ties to the union. By 2006, the combined vote share of these candidates exceeded 300,000 votes. Teachers were a core constituency.<sup>25</sup> It is also important to note that the teacher voting bloc also included retired teachers (who retired at the age of 55, and thereafter were no longer eligible to be union members), teachers in training (who were also not yet eligible to join the union), and the family members of teachers. This voting-bloc was large, and it sustained the left.

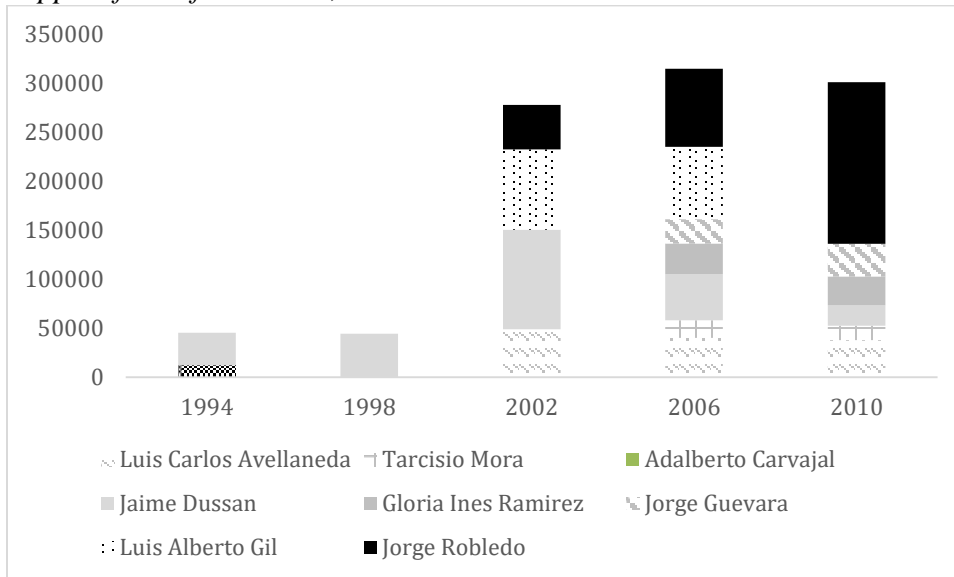
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<sup>24</sup> Luis Alberto Gil was a leader of the regional teachers' union of Santander. Initially he was in the M-19 guerrilla movement. When he formed his own political group in 1997, Citizen's Convergence, he shifted to the right.

<sup>25</sup> In addition to teachers, a medley of small labor groups, leftist militants, regional voters, and social movements accounted for other voters that supported these senators. However, these groups were smaller and more heterogeneous than teachers. Teachers were the largest group that supported the left.

**Figure 7**

*Support for Left Senators, 1994-2010*



Source: <http://www.registraduria.gov.co>  
<http://www.registraduria.gov.co>  
<http://www.registraduria.gov.co>

**Table 12***Support for Left Senators, 1994-2010*

<b>Candidate</b>	<b>Position in Teachers' Union</b>	<b>1994</b>	<b>1998</b>	<b>2002</b>	<b>2006</b>	<b>2010</b>
Luis Carlos Avellaneda	Executive Committee of FECODE	-	-	48,939	40,274	37,962
Tarcisio Mora	President, 1997-2000	-	-	-	17,868	14,674
Adalberto Carvajal	President, 1962-1970	12,094	-	-	-	-
Jaime Dussan	President, 1991-1994	33,175	44,347	101,660	47,233	20,755
Gloria Ines Ramirez	President, 2000-2002	-	-	-	31,376	29,520
Jorge Guevara	President, 2002-2005	-	-	-	24,820	33,426
Luis Alberto Gil	National Junta of FECODE / President SES	-	-	82,053	73,742	-
Jorge Robledo	University Professor			45,703	80,000	165,000
Total Votes Received		45,269	44,347	278,355	315,313	301,337

Source: <http://www.registraduria.gov.co>

All of these Senators made strong appeals to teachers. Those that were former leaders of FECODE, such as Avellaneda, Mora, Carvajal, Dussan, Ramirez, Guevara, and Gil, emphasized their leadership experience in FECODE in their biographies, and claimed credit for their work representing teachers. All of them (including Jorge Robledo) emphasized issues related to public education and teacher salaries. They campaigned on the same issues that they had advocated during elections for positions in FECODE. They organized campaign events in union headquarters, and enlisted teachers in their political campaigns. The collective identity of being a teacher became politicized, and multiple politicians sought to tap into this politicized identity.

There was a strong tendency of left voting, even if the teacher voting-bloc was not monolithic. Approximately 50 to 70 percent of teachers voted for the left at the national level, and in important, major cities, such as Bogota, the proportion could be even higher. Teachers elected left-leaning union leaders to represent them in FECODE's executive committee. Union leaders became politicians who made targeted appeals to teachers. Because of the growing electoral salience of teachers, left parties adopted the union's demands into their platforms.

### *Democratizing Reforms*

Democratic reforms set in motion the alignment of teachers and left parties. The term "democratic reforms" refers to political changes that fundamentally rewrote the rules of the game, but did not constitute a full-blown transition to democracy. Colombia had a longstanding electoral regime. It only fell under military rule from 1953-57, a short period of time compared

to other South American countries. Democratic reforms made an exclusive, oligarchic regime more inclusive. The exclusive regime contributed to an enduring rural insurgency, which threatened the political order. Democratic reforms sought to demobilize the insurgency and legitimize an embattled regime. In 1990, a constitutional assembly was convened that brought new actors into the politics. This was a response to social movements and some guerrilla groups that demanded major reform. It included the M-19, indigenous groups, and Afro-Colombians.

### Labor and Education Laws Strengthen the Union Organization

Prior to the 1990s, FECODE's organizational structure was precarious due to the state's refusal to recognize the union. The union's development was incremental. It started when the union won the landmark Teachers' Statute of 1979, which formalized the teaching profession. However, the Teacher Statute did not fundamentally strengthen the union, as such. Instead, reforms in the aftermath of the Constitution of 1991 consolidated FECODE. By the late 1990s, after establishing a strategic alliance with President Ernesto Samper, FECODE had a centralized organization and the capacity to mobilize from the top-down.

Democratic reforms produced a more inclusive policy-making framework. During the early 1990s, FECODE gained unprecedented influence over education policy. Two former FECODE presidents, German Toro and Abel Rodriguez, were elected to the seventy-delegate constitutional convention. Both were aligned with the AD M-19, the demobilized guerrilla group. Toro and Rodriguez enshrined the right to education for all citizens. This set the stage for new education laws that responded to teachers' demands in the period immediately after the ratification of the constitution. Including teachers signaled a new commitment to social rights and education reform. This was a major shift, since teachers enjoyed unprecedented opportunities to directly influence education policy. New labor and education laws were soon passed that strengthened the union as an organization.

The union was recognized as the legitimate representative of teachers, which had several consequences. First, the union was authorized to provide social welfare benefits to teachers. In 1989, on the eve of the Constitutional convention, the government passed Law 91, which created the union-managed teacher pension fund (*Fondo de Prestaciones del Magisterio*) (Bocanegra 2010). This fund was responsible for administering year-end bonuses (*cesantias*), pensions, and affordable housing subsidies. Formally, union leaders co-managed this fund with the ministry of education and ministry of finance, but in practice union leaders exercised disproportionate influence. In addition, the 1993 Law 100 authorized the union to contract its own private health service providers. Together, these laws made the union responsible for managing large sums of money on behalf of union members, which expanded the union's role in the lives of ordinary teachers. The administration of social welfare programs increased FECODE's political influence.

Second, new education laws accommodated FECODE's interests and strengthened its organization. After the union called large a protest in 1992, the government and the union negotiated two landmark education laws. The 1993 Law 60, the decentralization reform could have disrupted the union's national organization, as education decentralization did in Argentina



(see Falletti 2010, 144 & 234; Lowden 2004; Montenegro 1995; Lopez 2008).<sup>26</sup> A group of technocrats had proposed fragmenting the union by municipalizing education. But instead, President Cesar Gaviria compromised with the teachers' union and decentralized education to the departments. The government handed off administrative functions to subnational governments, while it maintained the national teacher labor code that kept teachers on the national government's payroll. Decentralization, which could have disrupted FECODE, instead preserved the national policies that sustained the union.

The other major law was the 1994 General Law of Education. A working group within FECODE, the "Pedagogical Movement," provided the intellectual leadership for this law (Bocanegra 2010). The General Law of Education mandated that each school set up its own special pedagogical projects (PEI), and it emphasized strengthening popular education for low-income students, goals that were in line with the union's political orientation (Lowden 2004). This law built on the teacher labor code of 1979, and limited the scope of punitive teacher evaluations. This was another instance in which the union's interests superseded those of technocratic policy reformers. The law also created departmental administrative committees, in which the union had representation, which authorized teacher transfers and other personnel decisions (Lopez 2008, 39). The laws of 1993 and 1994 marked a massive political victory for the union, and a setback for technocrats who wanted market-based policies.

Third, the state agreed to improve teacher compensation and working conditions. During the administration of Ernesto Samper (1994-98) teachers won salary improvements.<sup>27</sup> Samper was from a progressive faction of the Liberal party, and he had campaigned on a social policy platform in order to redress the unpopular, neoliberal policies of his predecessor. Samper named a prominent FECODE leader, Abel Rodriguez, as his vice-minister of education. Then, the president formed a strategic alliance with Senator Jaime Dussan, a former FECODE president. From 1995-97, Samper gave FECODE an 8% salary-raise each year, which went above and beyond the Teacher Statute, and these raises took place in the context of low levels of inflation (Lowden 2004). Teachers were also granted extra vacation days, five social clubs, and special funds to pursue additional credentials, which enabled them to ascend the salary scale more quickly.

These concessions strengthened FECODE. The union's primary source of revenue was union dues, 1% of teacher salaries were deducted and transferred to union confers (Gómez-

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<sup>26</sup> The accommodation of the teachers' union continued during the early 1990s, after the Constitution of 1991 was ratified. This is surprising because President Cesar Gaviria (1990-1994) of the Liberal party imposed neoliberal economic reforms onto other sectors of labor. Analysts speculate that Gaviria did not impose neoliberal reforms onto the education sector because he experienced "reform fatigue;" after enacting a number of unpopular economic reforms, he lacked the political capital to take on the teachers' union (Lowden 2004). He wanted to avoid disruptive teacher strikes, which would hurt his administration's reputation (Montenegro 1995; Falletti 2010). During the early 1990s, economic policy and narco-violence topped the political agenda, while education was a lower priority. In the context of economic liberalization, FECODE benefited from new, pro-union policies.

<sup>27</sup> Samper made concessions to the teachers' union because he was in a weak-negotiating position, after allegations surfaced of his campaign receiving illicit finance from the Cali Cartel. Samper desperately needed political allies in order to avoid impeachment, which enabled FECODE to extract concessions. Samper's policies led to a rapid rise in education spending, which irked technocrats.

Buendía and Losada-Lora 1984, 200-02 and 208-09). As teacher salaries improved, so too did the union's financial outlook.

Finally, during the 1990s the municipal and departmental governments granted union leaders permanent leaves of absence from their classroom duties. During the 1980s, fewer union leadership positions were subsidized by the state in this way. Most union leaders taught full-time, and worked for the union during their time off.

When I started, we [the union leaders] had to work normally, and after I finished my work in the union I went to school [to teach]. It was difficult when we were full-time teachers because sometimes I was not able to go to class. Finally, we got the administration to accept the fact that all of the members of the leadership junta needed commissions (Interview Bogota, October 8, 2012).

During the 1990s, the number of commissioned teachers (*permisos sindicales*) who remained on the teacher payroll increased to 15 for the national executive committee. This number was at least 10 in each departmental union. Union leaders became professional labor organizers who had no plans of returning to the classroom. The state subsidized the union by authorizing union leaders to work for the union. Municipal and departmental governments paid a substitute teacher to take over classroom responsibilities, while the union leader continued to receive his or her teaching salary.

By the end of the 1990s, the Colombian teachers' union had a strong, centralized organization. FECODE was recognized and subsidized by the state. It gained new responsibilities managing social welfare programs, administering pension funds, contracting health providers, and managing affordable housing subsidies. Increases in teacher salaries, and the ensuing windfall of union dues, made the union powerful.

In response, technocrats, such as Armando Montenegro and Alberto Alesina, published policy papers that were highly critical of pro-union education policies. They decried the union's growing political strength, and argued that policymakers were shortsighted. For technocrats, Presidents Gaviria and Samper seemed to base policy decisions on the goal of avoiding labor conflict and appeasing FECODE. Alesina famously remarked that the only path to education reform was to "break FECODE's spine" (Semana 2007).

### Electoral Law Reinforces Competing Factions

Electoral reforms that came out of the Constitution of 1991 sharpened the divisions among the left factions in FECODE's leadership. During the 1970s, left parties in the union were sustained by international support from China, the USSR, and Cuba. In the 1990s, electoral rules positioned these factions to win public office, and thereby gain unprecedented access to state resources. Because of the returns to holding elected office, left parties made strong pushes to win political representation. By entering the electoral arena, these parties massively expanded their base of resources.

The electoral rules promoted personalism and divisions among union leaders. Only a sliver of the electorate was needed to secure representation in legislative institutions, the Senate of the Republic being a case in point (Crisp and Ingall 2002). The Senate had a very high district magnitude; candidates competed for votes in a single, at-large national district. The top hundred voter-getters won seats. New parties could get a legal registry and campaign finance with 50,000 petition signatures (Moreno 2005, 491-92). Between 1990 and 2010, hundreds of politicians launched bids for Senate seats, since candidates competed on open-party lists. This set very low barriers to creating new, personalistic electoral vehicles. To illustrate this point, in the 2002 elections, merely 0.16% of the national vote-share was needed to secure a Senate seat. The smallest party that won a seat, the National Christian party, received 40,460 of the 24 million votes that were cast. This unusual electoral system fragmented representation, and gave rise to “electoral micro-enterprises,” which were electoral vehicles that were organized around small groups of voters (Pizarro 2006).

These rules positioned multiple left factions to pursue public office. Union factions had unparalleled access to an influential voting bloc, public school teachers, which numbered 270,000. These factions already had contact with teachers, which gave them a high floor of support to start off with. Influence over a fraction of the teaching profession propelled union factions into the Senate. Because a small bloc of votes was sufficient to win a legislative seat, multiple factions simultaneously competed for representation. Heated competition ensued for teacher votes, since multiple small parties wanted the support of the same group of voters. Even though these factions were all on the left, they had competing ambitions: a vote gained for one faction was a vote lost for another. Electoral rules produced zero-sum competition among union leaders.

The isomorphism between the electoral system for the Senate of the Republic and FECODE’s executive committee further divided the leadership. The design of elections for FECODE’s national executive committee was very similar to that of the Senate of the Republic. In both (a) elections took place within a single, national district, and (b) votes were divided among a large number of candidates. Teachers were not wedded to any one political group, and considered supporting different factions. These rules meant that factions needed to defend their vote share against rivals. Both the electoral system for the Senate and for FECODE’s executive committee incentivized a go-it-alone strategy, not coordination and vote pooling to a single party. This reinforced factionalism, and distrust between groups that competed for teacher support.

Sharpening divisions generated discord in the national executive committee. Union presidents built political organizations to pursue the senate, even when they were carrying out official union business, creating conflicts of interest. FECODE’s executive committee voted to remove two standing FECODE presidents because they were engaged in inappropriate political activities. President Tarsicio Mora was removed in 2000 for using the union to build his own political organization; he pursued unsuccessful senate bids in 2006 and 2010. In 2005, President Jorge Guevara was removed after he was accused of devoting too much time to his Senate campaign, and neglecting his work for FECODE. He was elected in 2006 and 2010. This conflict shows how deep the divisions became.

In sum, democratizing reforms divided factions, by transforming them into competing electoral vehicles. Elections for FECODE's executive committee became an important institution for building left parties. Union elections replaced teacher protests as the primary basis of political recruitment and mobilization. Moreover, having access to state resources strengthened left factions, enabling them to expand their outreach. This induced rival factions to secure their own resources in order to remain competitive. Competitive dynamics were reinforced both by the electoral system for FECODE's executive committee and for the Senate of the Republic. These institutions encouraged competition among factions, since they provided no coordination mechanisms.

### *Politicizing the Union*

#### Mobilizing Union Resources for Political Ends

Three parts of the union became politicized in the wake of democratic reforms: (a) the national union organization, (b) financial cooperatives, and (c) social welfare funds. First, the national union organization fell under the logic of the permanent campaign. Once left parties occupied leadership positions, they recurrently organized workshops, seminars, and events with the aim of conducting political outreach. Union-organizing activities advanced the particular objectives of small, left parties. Retired union leaders lamented the politicization of FECODE.

Union leaders use the union organization and resources for their own personal campaigns. Many union leaders have the mistaken opinion that political participation means running for elected office. They ignore the fact that being a union leader is itself a political activity.... the Colombian Federation of Teachers is a prisoner of the left (Interview Bogota, Colombia July 22, 2009).

Left parties used the union organization to strengthen their base of support. The work FECODE carried out, such as organizing teachers and hosting events, was used by union factions to build party organizations.

Left factions used public, union-sponsored events to advance their own partisan objectives. Union factions maintained "permanent contact with teachers through [union] assemblies and other events" (Interview Bogota, June 20, 2012). During site visits I conducted at the teachers' association in Bogota (ADE) in 2012 and 2013, I participated in three Pedagogical Encounters. Although these seminars were purportedly about providing information to teachers and debating education policy, they had the trappings of private, political meetings. They featured partisan speeches by union leaders, who claimed credit for defending the interests of teachers. The group hosting the event hung its particular banner, rather than the banner of the union. Left factions used public events at the union headquarters to recruit teachers into their parties.

Union leaders inappropriately used the union offices to organize campaign rallies and to articulate their political platforms. Union assemblies that were designed for multiple factions to hash out differences were taken over by politicians. According to one retired union leader:

They arrived at our union assembly, a Senator and a City Council member [without our permission] and they were very well received. It was like they were arriving home, they maintained a close relationship with their group, and their supporters don't see them as having ever left [the union], and so former union leaders can arrive and make stump speeches at the union. (Interview Bogota, June 15, 2012)

Politics became rooted in the union, and it was very difficult to set boundaries and avoid conflicts of interest.

The union's media outlets also fell under the logic of political campaigns. The union had its own radio station and television channel, as well as numerous printed publications, including the widely-circulated magazine *Education and Culture*.<sup>28</sup> The union turned to social media, and had a strong presence on Twitter and Facebook. Union leaders who became politicians mentioned the importance of the union's media outlets in their campaigns.

How did I link up to voters in my electoral campaign? We used the teachers' union and its radio station and newspaper, we talked to teachers and asked them to vote for us, I told them that I had been a teacher, a union leader, a leader of a teacher financial cooperative, and I helped to create schools. They knew that where I had worked, there hadn't been a school but I fought until the Secretary of Education put one there. (Interview Bogota, June 14, 2012)

The union had strong communication resources that allowed it to contact and transmit information to its base. These resources were directed to endorse left parties and union leaders who became political candidates used them to campaign for public office.

Teacher financial cooperatives were another part of the union that fell under the influence of left groups. These were the most important union-sponsored mutual aid organization, which resembled credit unions in the United States. Teacher financial cooperatives in Colombia held open elections for the board of directors, and left parties used these positions to expand their political influence.<sup>29</sup> Teacher financial cooperatives were powerful organizations. In Bogota, two prominent cooperatives, CANAPRO and CODEMA, became major money managers.<sup>30</sup> They initially managed the union's strike fund, which paid teachers when governments withheld salaries, or loaned money when salaries were paid late (Interview Bogota, October 8, 2012). According to one union leader:

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<sup>28</sup> Leftist factions also circulated their own newspapers that were geared towards teachers, including *Tribuna Magisterial* and *Boletín Renovación Magisterial*.

<sup>29</sup> There were other cooperative organizations where party-building activities also took place. In addition, recreational facilities and other parts of the union's associational network could be politicized. For example, COOTRADECUN, a teacher cooperative that provided credit, recreational services, and other benefits, was closely associated with Tarsicio Mora, and helped to finance his political organization. Various associated organizations, came under political pressure – union sponsored recreational facilities and vacation resorts, publishing houses, and education NGO.

<sup>30</sup> Codema. *Nuestra historia e identidad institucional*. (<http://www.codema.coop/nuevo/somos/historia.pdf>, accessed August 13, 2016)

The cooperative said, “I’ll make you a loan.” The cooperative became the wallet of teachers. When salaries were not paid out on time, teachers went [to the financial cooperatives] and asked for a loan (Interview Bogota, June 14, 2012).

Strike funds grew into sophisticated financial organizations that had significant assets. In 2014, CODEMA had upwards of \$(US) 26 million in annual income.<sup>31</sup> These cooperatives provided an array of financial services to teachers, savings accounts, loans, and mortgages, which were normally carried out through banks. Because of the Teacher Statute of 1979, public school teachers had a stable income and job security, which made them lower risk borrowers; these cooperatives offered low-interest loans and high-interest savings accounts.

Because cooperatives did not follow the same regulations as banks, they were vulnerable to politicization.<sup>32</sup> Lacking robust oversight, cooperatives advanced the political interests of union leaders (Interview Cooperative Leader June 15, 2012). They could be tapped for campaign finance and used for clientelism. CODEMA was badly mismanaged during the 1980s. Union leaders allegedly embezzled large amounts of money that was then invested in political campaigns. Moreover, they were also manipulated to influence how teachers participated in politics. There were two ways that parties used cooperatives for clientelism (Bogota, Colombia Interview August 6, 2014).

1. Union leaders expedited the time it took to process and grant a loan for political allies. Usually it took more than a month to grant a loan, but for political friends the wait time could be reduced to just three days.
2. Union leaders could overlook loan requirements when making loans to political allies. “Subprime loans” could be distributed to political allies who did not meet the requirements for income, labor stability, or credit history.

Finally, social welfare funds were appropriated for political ends. While formally, the union and government co-managed pension funds and health providers, union leaders had tremendous influence. The pension fund and health service funds were tapped for campaign finance. Union leaders peddled their influence, and extracted private benefits from their official functions. They directed contracts for affordable housing and health services to political allies in exchange for kickbacks. These social funds had great political significance for union leaders.

Some members of the government claim that union leaders are only concerned with the administration and oversight of the multi-million dollar resources that are managed through the *Fondo de Prestaciones Sociales del Magisterio* and the health contracts it makes, rather than issues that are purely educational or concerned with improving the teacher statute. (Lopez 2008, 44)

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<sup>31</sup> La Republica. “Coomeva, Colanta y Copservir, entre las más grandes cooperativas.” July 23, 2015.

<sup>32</sup> In Mexico, SNTE had a similar institution of teacher financial cooperatives, or credit unions, called the Caja de Ahorros, which also fell under a political logic.

During the early 1990s, investigative journalists reported that Jaime Dussan built his political organization, the Social Democratic party, by channeling contracts to political cronies (Guerrero 1997). Another instance of health providers being politicized occurred in the department of Santander. SolSalud, a health provider that was connected to Luis Alberto Gil, was used for money laundering. Money was channeled through this health provider into Gil's political organization, Citizen's Convergence. The social welfare benefits that the union acquired became a valuable political resource.

In sum, left groups used the union to build political organizations and form teachers into voting blocs. They redeployed resources for labor organizing into political activities, outreach, and recruitment. Union meetings were used as sites for political rallies, media outlets endorsed candidates, and financial cooperatives and social welfare funds were corrupted. Multiple parts of the union apparatus were politicized.

### Unsuccessful Instrumentalism

The sharpened divisions in the union leadership prevented the union from embracing instrumentalism. To be sure, there was no dearth of FECODE leaders who wanted a more flexible, and less ideological approach to politics. These included Jaime Dussan and Abel Rodriguez. Both of these leaders achieved a high level of status and were effective political operators. Both formed alliances with politicians from the traditional parties, Dussan with President Ernesto Samper and Rodriguez with María Eugenia Rojas de Moreno, the daughter General Rojas Pinilla. Both showed a willingness to engage in negotiations with a broader group of parties in order to advance the union's interests. In an alternative universe, it is easy to imagine FECODE playing a more instrumental role in Colombian politics had one of those leaders successfully consolidated power. Both had the ambition of doing so, although neither succeeded, due to the divisions in the union leadership.

Luis Alberto Gil was another intriguing figure who embraced instrumentalism. Gil was originally on the left, a militant of the M-19, but by the late 1990s he pivoted. In 2002, his party, Citizen's Convergence, formed an alliance with conservative President Alvaro Uribe. Because Citizen's Convergence was embroiled in a corruption scandal, involving the teacher health-service provider, SolSalud, money laundering, and paramilitary groups, it disbanded. However, it reconstituted itself as the National Integration Party (PIN), which was known as the "bad" party, due to its well-known ties to paramilitaries, drug-kingpins and other unsavory elements. In this discussion, Gil is important to consider, because he shows how a left-leaning union leader can pivot to the right. Gil's instrumentalism was possible because he consolidated power over the union in the department of Santander. Had power been divided within this regional union, he would not have been able to maneuver politically.

The point is that divisions in the union leadership reinforced the union's linkages to the left. Even though there were instrumental leaders in FECODE, they contended with more ideological leaders. Union leaders who tried to adopt an instrumental strategy failed. When instrumental leaders opened negotiations, left leaders out-flanked them and unleashed relentless accusations of selling out. The ideological leaders won the day, and kept the union rooted in the

opposition. The division of power among left factions, that embraced a partisan-ideological position, prevented instrumentalism.

Union leaders who tried to cut deals with conservative governments faced sharp backlashes. In negotiations over the Law 715 of 2001, Senator Jaime Dussan engaged in parliamentary negotiations with Presidents Andres Pastrana and Alvaro Uribe. Dussan won some concessions, in order to limit the damage done by neoliberal policies. While a New Teacher Statute was established in 2005, that was more flexible and changed how teachers moved up the pay-scale, teachers that were on the Old Teacher Statute of 1979 remained on it. Only newly hired teachers faced the new working conditions on the New Teacher Statute. Still, Dussan was criticized by other left factions for his “conciliatory attitude” and “parliamentary wanderings” (Benavides 2002, 11). Because these negotiations took place behind closed doors, Dussan faced allegations that he received side-payments in exchange for agreeing to vote “yes” for the Law 715 (Benavides 2002, 11). Left groups excoriated Dussan for selling out. His vote share declined in 2006, and it declined further in 2010, which caused him to lose his Senate seat.

More moderate union leader voiced frustration with the radical left. Abel Rodriguez sought to temper the union’s militant ideology, and embrace more pragmatic, center-left policy positions, thereby enabling broader negotiations. However, he was constrained by the far left, which was ideological and voiced support for the FARC, a deal breaker for most Colombian voters. Rodriguez critiqued the left party Democratic Alternative Pole, which struggled to broaden its appeal and raise its ceiling of support.

The left can overcome the problems that it has, but this would require some sectors to give up old politics. There is a severe ideological problem that intersects with the issue of the guerrilla and the war... however those sectors that express extreme ideologies are not going to give them up, which will limit the growth of the party... this means that the progressive forces, those that want to move forward, will need to break away. (Interview Bogota, Colombia June 28 2012)

Left groups carved out niches of support within the union, which weakened leaders that were more pragmatic and flexible. While some union leaders recognized that less ideological position could benefit the union and advance progressive causes, the ideological factions were unwilling to moderate their demands.

Several union leaders proposed instrumentalism as a means to expand FECODE’s influence. However, leadership divisions were a major constraint, and they prevented this strategy from working. Instrumentalism requires a consolidated leadership that has the capacity to negotiate as a collective entity, and the capacity to deliver on its negotiations. The Colombian union had multiple left factions. These factions were unable to coordinate, even though each was hierarchically organized and had the capacity to exert internal discipline. The Colombian union lacked the leadership structure that made instrumentalism a viable option.

### *Institutionalizing Leftism*

#### Violent Backlash by Conservatives



Democratic reforms provoked a violent backlash by conservative groups. After politics moved in the direction of the inclusion and accommodation of left-leaning groups, there was a conservative reaction that unleashed a wave of violence (Carroll 2011, 1-2). Democratic reforms failed to demobilize the FARC and ELN, the two largest guerrilla groups, which continued to wage war against the state, engage in kidnappings, extort legal and illegal (i.e. narco) enterprises, and carry out terrorist acts. In response, sectors of the military, landowners, and drug kingpins sponsored paramilitary organizations. They conducted a campaign of violence against left-leaning activists, labor leaders, community leaders, and journalists, who were accused of abetting the guerrillas.

During the 2000s, the Conservative backlash won popular support. After peace negotiations failed between President Andres Pastrana and the FARC Commander Marulanda, hardline President Alvaro Uribe was elected in a landslide in 2002. Uribe intensified the war efforts against the leftist guerrillas. Members of his administration were implicated in the “parapolitica” scandal in 2006, in which politicians had illicit ties to right-wing paramilitaries.

Teachers experienced a significant level of political violence. Between 1990 and 2007, 600 teachers were killed. An even larger number were displaced, unlawfully detained, kidnapped, and subject to death threats. Right-wing groups targeted teachers and union leaders. The circumstances surrounding this violence reflected the ambiguities of Colombia’s armed conflict. Some teachers were politically active in peaceful left-leaning groups and others were community leaders. A few teachers had ties to guerrilla groups, for instance the militant leader of Antioquia, Felipe Velez, who was in the EPL and was assassinated in 1992. The vast majority of teachers were not involved in guerrilla organizations, they just supported left-leaning parties. For instance, in 1999, Tarsicio Mora, the President of FECODE, who was a Communist, narrowly escaped an assassination attempt.

Violence against teachers had contradictory effects. For some it induced fear. The threat of violence convinced teachers who felt at risk because of their political participation to become apolitical. Some teachers wanted to disassociate from the left and guerrilla movements, in order to protect themselves and their families. Teachers did not want to be caught up in the violent campaign that was being waged by paramilitaries. One way of doing this was to retreat into the private sphere. One strategy was to stay away from protests, rallies by left-leaning groups, and other activities that were considered subversive.

Violence, however, also had the unintended consequence of strengthening the ties between teachers and left parties. Political violence weakened rival left groups, which enabled factions within the union to pick up the banner. The Patriotic Union (UP), the political arm of the FARC in the late 1980s, was decimated by political violence (Carroll 2011, 9-14). The next iteration of the left was the AD M-19, which won representation in the constitutional convention of 1990, but disappeared after 1994. These left parties saw FECODE leaders as rivals. Indeed, in 1994 the AD M-19 refused to include Jaime Dussan on its parliamentary lists, which induced Dussan to form his own electoral vehicle, Education, Work, and Social Change. Violence weakened rival groups that competed against the left parties in the union. After the UP and AD M-19 disappeared, the teachers’ union became the vanguard of the left.

Violence also strengthened the ties between teachers and the union. Even if teachers did not identify with the left, paramilitary groups saw them that way. Teachers feared they could be the targets of violence, no matter their actual political ideology, they moved closer to the union for protection. FECODE advocated on behalf of human rights and took on the cases of union members who faced death threats. In 1999, three hundred teachers received support from the union because they faced such threats (El Tiempo 1999). This human rights work enabled FECODE to get international solidarity and support. Violence expanded the role the union played in defending human rights; the union claimed credit for protecting teachers. The threat of violence fostered solidarity within the union, and it strengthened the in-group versus out-group dynamic. It helped to forge a collective, political identity.

Whereas violence against teachers in Argentina during the military dictatorship eroded the union's organization, in Colombia violence did not have the same effect. Violence was more of a rural phenomenon, and it was restricted to certain departments and municipalities. During the 1990s, it did not deter teachers from protesting en masse, or from voting for left parties. Violence strengthened FECODE's legitimacy, and enabled it to provide assistance to teachers who were in danger.

### Programmatic Cleavages on Education

Factional conflict in FECODE was contained by the deepening cleavage between teachers and the right. Neither the Liberal nor Conservative parties conducted political outreach to teachers, which was reflected in their neoliberal education policy proposals.<sup>33</sup> This created an opening in which the left expanded its support among teachers. Meanwhile, the traditional parties used education reforms to antagonize political opponents. Since teachers were unavailable to these parties, the costs of embracing education reforms that were unpopular among teachers fell. Indeed, conservative parties even relished the prospect of launching policies that the union opposed, because FECODE was an important base of opposition.

By the early 2000s, the traditional parties pushed education policy in a direction that teachers strongly opposed. Technocrats advanced policy changes to "rationalize" the education sector, they sought to control the rising costs of education and to establish teacher evaluations in order to promote merit-based teacher hiring. President Andres Pastrana (1998-2002) of the Conservative party pushed through a major education reform in 2001. The Law 715 imposed a freeze on increases in education spending. Presidents Alvaro Uribe and Juan Manuel Santos continued education policy in neoliberal direction. Uribe established a flexible labor code for teachers hired after 2005. Doing away with credentialing requirements, teacher hiring took place through a merit-based entrance exam that was opened to all professionals, including those who did not hold an education degree. These reforms also rationalized the distribution of teachers across schools; forcibly moving teachers from more desirable schools that were over-staffed to less desirable ones that were under-staffed. This reform also eliminated political influence over teacher transfers and eradicated redundant teaching positions (Lopez 2008, 35). The new formula for staffing schools was based on a fixed student to teacher ratio (Lopez 2008, 39).

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<sup>33</sup> Democratic reforms also destabilized the traditional parties that teachers had previously supported, which made it more difficult for them to conduct outreach to teachers.

The ideological distance between the left leaders in FECODE and the conservative, ruling parties, created little room for negotiation or compromise. The teachers' union was not included in policy decisions after 2001, and these policies generated sharp opposition. During the policy design phase, FECODE resisted these proposed changes with protests and parliamentary negotiations, although it was unable to block them (Lopez 2008, 43). FECODE President Gloria Ines Ramirez mobilized massive demonstrations against this new law, and wrote op-eds in the magazine *Semana* lambasting the neoliberal logic behind these reforms, although these measures failed to block these new laws.

These policies produced a uniformly negative reaction among teachers. Union factions came together in opposition to the new teacher statute and the controls on education spending (Lopez 2008, 41). The union's opposition to the conservative education agenda overshadowed competition among left-leaning factions.

As a reaction, the union deepened its support for the left. It sponsored the formation of Democratic Alternative Pole (PDA) in 2005, serving as the largest social organization that supported this party. The national executive committee of FECODE changed its partisan identity, instead of referencing their particular union faction, 14 of the 15 members of the committee declared their allegiance to PDA (Lopez 2008). By 2006, the union became wedded to left parties. PDA made a strong push to win teacher support, and they included the union's demands in their policy platform. In its statement of principles PDA committed itself to FECODE's education policy agenda: "Public education should be universal, high quality, free, and compulsory for preschool, elementary, and high school, as well as for technical and higher education. We will re-establish the labor rights, salaries, and professional development of teachers."<sup>34</sup>

PDA was an opposition party that was, at its peak, only a small bloc in the national legislature. This meant that PDA did not have the clout necessary to substantively influence major education policy decisions. A legislative assistant of Senator with ties to the union said:

The idea that legislators can solve teachers problems, in our view is a mistake, we have managed to resolve a few problems, but not many, because we are small minority in the legislature. There are 266 legislators and we only hold 14 seats ... the only thing we can do is insert a few favorable items for teachers into legislation when there are possibilities to do so (Interview Bogota, June 20, 2012).

While senators from FECODE claimed credit for advancing the interests of teachers, they were better positioned to pass laws that fine-tuned education policy, rather than making wholesale changes to it. The national influence of the left was weak, even though the program of this party was squarely aligned with teachers.

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<sup>34</sup> See: "Ideario de Unidad" – created by Independent Democratic Pole and Democratic Alternative in the moment of inception of the Democratic Alternative Pole (<http://www.polodemocratico.net/Ideario-de-unidad>, accessed September 27, 2007).

Still, at the subnational level, left parties were able to govern, and education policy reflected the interests of teachers. Left parties won governorships and mayorships. One such case is the Capital District of Bogota, where the teachers' union helped elect leftist mayors in 2003, 2007, and 2011, bringing about a subnational "left turn." In Bogota, union leaders were promoted and took high-ranking positions in the education bureaucracy. Abel Rodriguez, one of FECODE's most prominent leaders, was named the Secretary of Education in 2003 and again in 2007. Union leaders embraced a "social investment" model of education in Bogota, and spending on education ramped up dramatically. Under the conservative administrations of Enrique Penalosa and Antanas Mockus, the budget for education was 6% of the municipal budget. Under Lucho Garzon and Samuel Moreno, the budget increased from 6% to 12%, and under Gustavo Petro it reached 17% (Interview Bogota, June 5 2012). While the union's national influence was limited, the union's subnational influence, in cities and departments that were governed by the left, was significant.

The point here is that the alignment of teachers with the left created a programmatic cleavage on education policy. The traditional parties increasingly embraced a technocratic model for education that was in line with the interests of pro-business allies. Teachers sharply opposed this model, and instead embraced a vision of education reform that emphasized inclusion, maintaining the role of the state in providing public education, and improving teacher compensation and opportunities for continuing education. As the cleavage between teachers and the right grew, left parties shifted their programs such that they closely resembled the demands of the union. This cleavage helped to cement the ties between teachers and the left.

### *Conclusion*

In Colombia the union had a centralized organization and a divided leadership, which made it leftist. Teachers were organized into a single, powerful union. This union, while formally a federation, operated like a national union. It had significant organizational resources that enabled it to mobilize teachers from the top-down. The union experimented with supporting opposition parties during the 1990s. This support yielded significant political representation, which reinforced electoral mobilization through the union. The union consistently delivered its base to leftist political parties. Electoral mobilization displaced teacher protests. While historically the union organized massive protests, the centralized organization limited the space available to dissident activists. The formal union leadership, rather than grassroots activists, was in control, and it became oriented towards electoral mobilization.

Like the Argentine union, the Colombian union also had a divided leadership. As a consequence, the union was responsive to the demands of the rank and file. While some union leaders sought to negotiate with conservative ruling parties, rival factions sharply criticized them. As a consequence, power sharing in the union leadership constrained and limited strategic action. National union leaders were reluctant to negotiate with non-leftist parties, since doing so galvanized rival leaders. Competition among multiple leftist factions made the union oppositional. Union leaders forged alliances with leftist parties, but they had a difficult time negotiating with the governing, right-wing parties.

The outcome of organizational centralization and leadership divisions was leftism. Protests became a declining feature of teacher mobilization, while electoral mobilization ramped up. Indeed, teachers became a pivotal voting bloc for leftist parties; teachers successfully enshrined their interests in the platforms of these parties. While leftist parties were unable to govern at the national level, teachers were a strong voice for the opposition. Moreover, at the subnational level, teachers were brought into the governing coalition where leftist parties won power in departments and municipalities. Meanwhile, teacher protests became less and less relevant. After right-wing governments threatened to withhold teacher salaries when teachers went on strike, the union called fewer protests. Union leaders had other channels to represent their interests, and so they placed little importance on contentious actions.

## Chapter 6: Political Incorporation, Education Policymaking, and Teachers

### *Overview*

This research provides a new perspective on contemporary interest representation in Latin America. The focus is on analyzing why similarly situated labor unions exhibited such different patterns of political mobilization across countries. Teachers are an interesting case to consider, because as public sector unions, they are sheltered from international market pressure and thus likely to be more militant than private sector unions (Murillo 1999, 35). However, teachers' unions in Latin America have developed strikingly different strategies under democracy, some of which are militant, others of which are not. This study conceptualized and described these forms of mobilization and it provided an explanation for why they developed.

**Democracy and Political Opportunities.** New forms of political participation by teachers were only possible after regime openings during the 1980s and 1990s. Throughout the 20th century, authoritarian and exclusionary regimes restricted political rights. Many groups in society, including teachers, were unable to fully participate in politics. Arbitrary rules forced teachers to resign from the profession in order to be political candidates. Conservative labor codes forbid teachers from supporting certain political parties, i.e., those on the left. Teachers also faced other, more informal restrictions on political rights. In many countries, the education system was governed through patronage networks. Regional party bosses used public schools and the education bureaucracy to reward party activists and compelled teachers to vote for the ruling party (for instance, see Plank 1996: Ch. 3-4 on Brazil).

Because teachers could only take part in politics in limited ways, the profession had a difficult time exerting influence on governments to improve working conditions and shape education policy. In many countries, teacher wages lagged behind other workers, and during economic downturns, such as the debt crisis of the 1980s, when governments imposed harsh salary freezes and austerity measures. Even during periods of relative economic stability shortsighted politicians created major budget shortfalls. These politicians attempted to balance the budget by withholding teacher salaries (i.e., paying teacher salaries late), or even using non-monetary forms of compensation to pay teachers. Teachers had little recourse, though they often voiced their discontent with protest and contentious action, which usually had little influence on politicians.

The emergence of democracy marked a turning point. Free and fair elections and the expansion of political rights opened channels for the articulation of new interests. The teaching movement took on unprecedented political significance. It had made incremental advances in its organizing efforts in the decades leading up to the 1980s. In the context of a more politically open environment, teachers' unions leveraged their organizational assets, albeit in different ways. The diverse forms of political action by teachers share a common thread. Under democracy, teacher political action became bolder and more pronounced. Democracy created an opportunity to expand education spending, and to finally give teachers the income that corresponded to university-educated, middle-class professionals. Teachers gained salience on the national political stage.

**Varieties of Teacher Representation.** My research has analyzed the diverse ways that teacher labor organizations participate in politics in the 21<sup>st</sup> century. In some countries, teachers' unions were movementist, organizing recurrent protests. In Argentina, teachers ratcheted up contentious actions. They had reason to think that newly elected politicians would respond favorably to outsider demands, rather than responding with a violent crackdown. Moreover, union leaders were averse to organizing teachers into a voting bloc. They were unwilling to politicize the union and mobilize teachers as voters. Instead, intractable teacher protests became a common tactic, with no resolution between unions and governments in sight.

In other countries, democratic openings during the 1980s and 1990s created an unprecedented opportunity for left parties to participate in politics, and teachers were swept up in the formation of these new parties. This analysis has focused on the case of Colombia, but Chile and Brazil may also fit the pattern I have called leftism. For these unions, protests declined. When they did occur, they were resolved through some kind of negotiation, and if they were not resolved, they nonetheless came to an eventual end. Unions exercised political rights by entering the political arena, and organizing as a voting bloc around their professional identity. Teachers became a bulwark of left parties. There was a programmatic affinity between teachers and the left, since both defended the public character of education and national labor policies. Union leaders were regularly recruited as political candidates for left parties. Teacher influence depended on the fate of left parties. Where left parties held power, teachers exerted strong influence; but when they were relegated to the opposition, teachers lacked influence.

In still other countries, such as Mexico, democratization opened the door to strategic, instrumental behavior. Teachers separated from longstanding labor parties, and developed short-term, contingent alliances with multiple parties. The aim was to increase spending on education, improve teacher working-conditions, and push up wages. In addition, union leaders sought access to discretionary resources to enhance the union's political power. Such resources enabled union leaders to reward lower-tier officials and mobilize teachers from the top-down. Union leaders also installed their own representatives in public office, but these representatives articulated a more particularistic, rather than programmatic, set of interests. They were more responsive to the union than to any political party. Instrumentalism enabled unions to exert influence regardless of ruling party ideology, which meant that influence was more persistent over time.

**Explaining the Contrasts.** I argue that specific attributes of the union organization and the leadership jointly determined whether unions were movementist, leftist, or instrumental. In the context of democratic openings, the character of labor organizations and their leaderships shaped teacher activism. Two levels of analysis are presented: (1) the union organization (centralization, as well as institutional and resource-capacity, or strength), which encompasses the union's finances, its member-services, its permanent staff, and its associational network, and (2) the union leadership, which encompasses leadership cohesion and the dynamics among groups of leaders.

(1) Organizational centralization enabled electoral mobilization, and positioned these unions to acquire enormous political power. The union gained political leverage and the capacity to mobilize in the electoral arena.

Stronger, better-resourced unions were more organized in the electoral arena. They had the resources necessary to build an institutionalized voting bloc, and to mobilize en masse from the top-down. Unions that had abundant resources invested them in political campaigns and constructed networks of electoral mobilization. Unions rallied teachers, and other voters, during elections.

By contrast weaker, poorer unions relied more on protest and contentious actions. Union leaders lacked control over rank-and-file teachers, and the proliferation of union activists prevented restraint. Instead of becoming powerful political organizations, unions became a haven for grassroots activists. The official union leadership was less powerful. This meant that grassroots activists defied calls for internal discipline and mobilized wildcat strikes. As a result, the union was characterized by recurrent protests that were not coordinated by the national union leadership. Correspondingly, electoral mobilization was sporadic and disorganized. Unions lacked the organizational muscle to bring teachers together in the political arena. Hence, the degree of union centralization and strength had major implications for whether teachers emphasized politics or protest.

(2) Whether union leaders took strategic action and embraced instrumentalism, depended on cohesion of the union leadership. Unions with a cohesive leadership had the capacity to enact decisions that generated resistance among rank-and-file teachers. When the leadership remained cohesive, it overcame grassroots resistance.

When leadership was divided, unions were more oppositional and reactive. They largely maintained their established partisan identities, and lacked the ability to conduct outreach to new parties. Small, left parties carved out enclaves of support among union members. These parties had more parochial interests, related to winning power in the union leadership, and they were less concerned about the overall strategic direction of the union. As a consequence, any deviation from longstanding partisan alignments generated a backlash by rivals in the leadership, who mobilized the anger of the rank-and-file against leaders who behaved strategically.

**Origins of Union Organization and Leadership.** Both historical legacies and the character of democratization transformed unions. Prior to democratic transitions, unions had established different corporatist legacies. Unions had different starting points. Some had stronger, more centralized organizations. Others were more decentralized; they had weaker labor laws, fewer state subsidies, and prolonged periods of repression. Teachers' unions were put on different developmental trajectories, depending on how they initially came together. The precise moment at which unions were legally recognized and subsidized by the state had far-reaching consequences for how teachers participated in politics under democracy.

The process of union organization began during the 1960s and 1970s for many teachers' unions, which was decades after industrial unions had already been formed. As teachers' unions were legalized and received state subsidies, they took over a number of member services. Unions developed more centralized organizations when the state allowed them to play a greater role in providing health services, managing pension funds, resolving labor disputes, and facilitating career advancement. In Mexico, the union was heavily and subsidized during the 1940s and



1950s, and it developed a centralized organization the earliest. In Colombia, the union did not acquire new resources until the 1980s and 1990s, which resulted in union centralization occurring later. In Argentina, subsidies and state recognition were not forthcoming. There was reluctance on the part of political elites to grant resources to teacher organizations, which left unions fragmented.

Democratic openings also had transformative consequences. In each of my cases, regime openings created opportunities for unions to move towards different types of political action. These political transitions transformed the linkages between teachers' unions and parties, by exerting new pressures on the union leadership. Often regime openings went hand in hand with reforms to electoral rules. The trend was to adopt rules that rolled back majoritarian electoral systems, and replaced these with rules of proportional representation. The new rules remade the linkages between the union leadership and political parties by shaping the pathways that union leaders followed into politics and the positions that unions occupied in partisan coalitions. Depending on how electoral systems were designed, they created pressures that either brought the leadership together under the banner of a single party, or they split leaders apart among multiple parties.

### *Theoretical Implications*

#### Varieties of Political Incorporation

This study contributes to research on the concept of political incorporation by examining it from the perspective of a distinctive occupational group: public school teachers. Political incorporation is a thick, multi-dimensional concept. While it is often invoked loosely, as a synonym for “political inclusion” or “to integrate outsiders into politics,” the different meanings of incorporation need to be unpacked and made more explicit. The late political incorporation of teachers differed fundamentally from the earlier incorporation of industrial workers. The literature has focused on macro-level processes of political incorporation that occurred during specific historical moments but that unfolded differently across countries. This section describes how the concept may be revitalized and applied to the 21<sup>st</sup> century. The older model was rooted in resolving class conflict. In contrast, the newer model is centered on democratization and democracy which, even within a given country, has been uneven across groups; “inclusion” may be a more apt label for what has occurred. A more disaggregated, sectoral approach may yield more insight into how groups are inserted into politics.

**The Industrial Incorporation Model:** Collier and Collier (1991), Schmitter (1974), and Przeworski and Sprague (1986), among others, provide a framework for analyzing the political incorporation of the working class in the early 20<sup>th</sup> century. The process began with economic change. The transition from agriculture to industry produced a new social group: the urban working class. This group demanded political recognition in order to advance labor rights and social protections against the new risks of the market. The working class grew in size, in proportion to the expansion of the manufacturing sector. By the mid-20<sup>th</sup> century, it reached a critical mass and became a significant group in the political arena. Blue-collar, manufacturing unions emerged and articulated a mounting set of economic and social grievances. Labor unrest posed a major threat to the political order, as the labor movement developed power resources.

The specter of Socialism and Communism loomed large. The initial response to labor unrest was to repress and neglect in order to avoid enacting major reforms.

The incorporation process began when the state enacted social and economic reforms to address the “social question,” prompting a major shift in state-society relations. As repression became costly, political elites began to formally recognize and legalize unions, thereby bringing them into politics. These elites used the state to structure, subsidize, and grant legal status to unions, responding to at least some of the demands from below. The most important response of the state to the labor movement was to grant to unions new resources and privileges. Some of the political leaders who enacted the reforms that incorporated workers actually wanted to bring workers into party politics and mobilize political support. Yet others who supported such policies did so because of opposite aims. They wanted to depoliticize and control workers by restricting political action.

A key idea underlying political incorporation is that it involves a discontinuous change. Labor incorporation was a *sui generis* window; it was the first major, sustained attempt to bring workers into politics. Political leaders who tried to mobilize workers later, after the window had closed, were unable to do so, since workers had already cemented partisan identities. There was a moment of change that occurred when workers, throughout the region, entered politics. This period coincided with “mass-politics,” when the franchise was expanded to the lower classes, but it was not the era of full-blown democracy. Political incorporation took place in an authoritarian or semi-democratic context. In many countries, populist leaders consolidated power, elections took place on an uneven playing field, and political rights were unevenly enforced.

From the perspective of unions and workers, labor incorporation involved the demobilization of militant and combative labor leaders. The labor *movement* evolved into *organized* labor, which had a more vertical structure in which power was centralized in the officially recognized union leadership. Legal status and subsidies transformed labor organizations and labor bosses consolidated control over rank and file workers. This consolidation helped to generate peak-level negotiations in which politicians, business leaders, and labor bosses reached agreements on wage increases and inflation targets. In countries where unions were incorporated into populist parties, grassroots activists were displaced and weakened. The incorporation of labor usually achieved its goal of demobilizing the most militant labor leaders and establishing control over workers by way of officially recognized unions. Incorporation was a double-edged sword. It provided representation to workers, but also restricted the channels available to articulate interests.

Labor incorporation can also be interpreted from the perspective of politicians and political parties. In addition to articulating the interests of workers, labor leaders also advanced partisan interests. Politicians harnessed the power of the labor movement and built dominant political parties. Unions that were incorporated into populist parties gained access to state resources and formed workers into a powerful voting bloc. Labor leaders, as political brokers, were responsible for mobilizing workers during elections, and through this political organization, workers developed new, partisan identities. Labor-based parties had a high floor of support since they could count on the discipline of powerful worker organizations. As labor organizations

became a significant political force, union-party alliances reinforced the vertical relationships between labor leaders and rank and file workers.

The industrial model describes a global pattern that unfolded during the early to mid-20<sup>th</sup> century. In Western Europe labor incorporation yielded Socialist and Social Democratic parties that adopted universalistic social policies and constructed encompassing welfare states. In Latin America, this process generated populist parties, in which powerful unions operated as a coalitional fulcrum. Countries that incorporated workers into labor-based parties usually had stable, structured party systems, since labor unions anchored them. Labor incorporation sheds light on the emergence of a macro-level political actor, the organized working class, and the paths that this actor followed as it was inserted into the political system.

**The Contemporary Incorporation Model:** Contemporary processes of incorporation are quite different from the industrial incorporation model. To be sure, some scholars have compared the political changes wrought by the neoliberal economic model and democracy as producing a “second incorporation,” in which left governments came to power and articulated the interests of a new set of lower class groups (Rossi 2015). However, others suggest that the concept of incorporation is outmoded, and instead describe patterns of political “inclusion” that recognize groups in more democratic regimes (Dryzek 1996). From the current vantage point, several key differences between the models of incorporation are worth highlighting.

First, incorporation during the contemporary period took place under the auspices of democratization. New international norms prompted political reformers to make institutions more representative. In the contemporary period, the impulse to bring new societal actors into politics is based on ideas related to the expansion of political rights, especially to historically underrepresented minorities, and enhancing regime legitimacy. This was reflected in new electoral systems that created quotas for certain disadvantaged groups, such as women and ethnic minorities, guaranteeing a floor of political representation. Moreover electoral rules that represent parties based on the proportion of votes won, and that set low thresholds for winning at least one seat, have a minoritarian bias. They favor small parties and create space for new parties to form. These rules can be traced back to democratic openings, during which new groups entered politics. These efforts to make democracy more representative and legitimate are quite different from the earlier pattern, in which incorporation was driven by the threat of class conflict.

Second, a heterogeneous group of societal actors have entered politics. Whereas labor incorporation was about the inclusion of a relatively homogenous, macro-level societal actor, i.e. the working class, in the contemporary period political incorporation involves a large number of heterogamous groups. Groups that have been incorporated more recently are (a) ethnic groups (Yashar 2005; Van Cott 2007), (b) informal sector workers (Rossi 2015; Garay 2016), (c) women (Htun 2016), and (d) environmental movements (Kitschelt 1994). Teachers are another group that fit this broader trend of including heterogeneous groups in politics. In contrast to the industrial working classes, this set of outsider groups have widely divergent interests, some of which are materialist, and others of which are post-materialist. They usually lack encompassing, mass-based organizations. Contemporary incorporation has been uneven, as different groups gained prominence in different countries.

Third, alongside the diverse set of groups that are inserted into politics, the ways that parties represent group interests have also shifted. In the contemporary period, broad-based, populist parties organized around a programmatic set of policies are in decline. Increasingly, parties have embraced catchall appeals and clientelism in order to mobilize voters. These new strategies have generated factionalism and party splits; in many countries, party system instability is the new norm. This more fluid political environment enables new groups to enter politics, since organized groups may have relative power over weakening parties. But it also makes it hard to sustain political representation, since parties may pivot away, and appeal to new groups. Societal actors may form new parties, or they may become a coalition partner for broad-based parties. Groups have established multiple relations with parties that can vary in terms of the strength of the linkages.

Fourth, the politics of mass-based interest organizations, such as labor unions, has changed quite dramatically. After the implementation of neoliberal economic reforms in the 1980s and 1990s, that labor movement, as a whole, was weakened. At the same time, however, there was a shift in the internal composition of the labor movement. While manufacturing unions declined and even disappeared, an emerging group of unions became more powerful. In some countries, the export sectors became more dynamic, since workers in industries that returned to profitability after economic reforms, such as the teamsters in Argentina, could demand sharper wage increases (Collier and Etchemendy 2007). Public sector unions are another segment of the labor movement that has quietly gained power in the aftermath of neoliberal reforms. Unions of public employees are sheltered from international market pressures, and have largely avoided structural reforms that would undermine their base of power.

The contemporary activism of teachers provides a new perspective on political incorporation. Like industrial unions during the earlier 20<sup>th</sup> century, teachers received new subsidies and state recognition in the wake of democratic transitions. This suggests that the label of incorporation aptly applies to them. However, teachers' unions were not large enough to fundamentally upend the party system; they lacked the numbers necessary to transform national political dynamics or to deliver an electoral majority. Teachers and teachers' unions did, however, come to play multiple roles in politics: (a) they challenged parties as oppositional, outsider groups, (b) they became coalition partners for parties, (c) they defected from longstanding partisan allies, and (d) they set off as independent political forces. It was these new roles that had significant implications for education policymaking.

### Teacher Activism and Education Policymaking

Teachers' unions are described as a special interest par excellence (Grindle 2004; Nelson 2007; Moe 2011, 2015). Because they are highly organized and have a coherent set of interests, they are positioned to exert outsized, or even disproportionate, influence on education policy. This influence has made teachers' unions controversial. Some analysts blame them for making public school systems highly bureaucratic and unresponsive to the needs of children and parents. Unions lobbied for labor laws and bureaucratic rules, which protect bad teachers and make it difficult to hold teachers accountable for how much (or little) students learn in the classroom. Teacher labor organizations are blamed for being a root cause of dysfunction in public education.

The literature has portrayed teachers' unions as highly organized and narrowly self-interested. Moe (2015) argues that teachers' unions are "vested interests," that hold school systems captive. For critics, the fundamental interest of unions is in protecting jobs, defending outdated rules, and lobbying for higher salaries, regardless of teacher performance (Moe 2015; Bruns and Luque 2014, Ch. 6). For example, unions support pay raises that are based on seniority rather than classroom effectiveness. Teacher absenteeism is a chronic problem in many countries because tenure rules, which unions strongly support, prevent any kind of disciplinary action. In recent years, unions have opposed all policies that make it easier to identify and remove bad teachers, such as evaluation and more flexible rules governing teacher hiring, promotion, and firing. Teacher labor organizations are seen as rent-seekers, since their primary concern is to acquire state resources and protect their members.

These studies make important points and should be considered carefully. But, they lump together teachers' unions that operate in fundamentally different ways. As a result, some elements of teacher representation fit this framework better than others. My research comes at the question of policy influence from a more comparative angle, and considers the divergent forms and consequences of teacher activism. I argue that mobilizational strategies – movementism, leftism, and incrementalism – produces distinct policymaking styles.

**Movementism.** Movementism is associated with intractable protest. Because of fragmentation in the teacher movement and the inability of teachers' unions to discipline grassroots activists, there is a tendency for protests to be recurrent. Contentious mobilizations are effective in bringing government officials and union leaders to the negotiating table. However, movementist unions often fail to generate lasting agreements to improve teacher salaries (Etchemendy 2011, 100-104). Politicians anticipate that protests will recur the next year, and, thus, have little incentive to push for a decisive resolution. This generates an equilibrium in which protests are recurring, teachers are permanently frustrated, and teacher grievances remain unaddressed. Protests also tend to drag on for a long time, with the state ignoring or only partially responding to teacher demands.

In general, movementism generates poor outcomes for teachers. In Argentina during the 2000s, teachers were paid less in terms of salary as a percent of GDP per capita than their counterparts in Chile and Mexico (Rivas et al 2010, 45 see Graph 1.23). Other unions that had movementist characteristics, such as the dissident teachers in Mexico during the 1980s and militant Colombian teachers during the 1960s and 1970s, also failed to substantially improve teacher compensation. Teacher salaries in Argentina improved only modestly in real terms after 2003. Overall, the outsider strategies of movementism produce limited benefits for teachers.

Protests can, however, improve wages when there is a propitious political environment. For instance, governments responded to teacher demands when economic conditions improve and resources are available to increase spending on education. In Latin America after the debt crisis of the 1980s, governments were more responsive to teacher protests, and they increased spending on education in order to restore teacher wages, which had declined as a consequence of austerity measures. Another propitious factor is pro-labor governments, which have tended to implement policies benefitting teachers. However, for movementist unions, partisan alliances are

tenuous, and so lasting agreements that involve union restraint are not possible. Protests are not sufficient to bring about improvements in teacher working conditions; rather, they, interact with other political factors in complex ways, and inconsistently yield benefits.

An externality of movementism is high rates of teacher absenteeism. In Argentina, teacher strikes contributed to a shortened academic calendar. When teachers took to the streets, students did not receive the full 180 days of classroom instruction (Murillo and Ronconi 2004; Chiappe and Spaltenberg 2010). Governments responded by offering an “attendance bonus” to teachers who never missed class, and they withheld this bonus from teachers who participated in protests. This policy, however, failed to restrain teacher militancy. The threat of strikes was the primary lever through which the teacher’s union articulated its interests. Teacher absenteeism undermined the legitimacy of teacher protests, and conservative politicians and newspapers condemned the union for hurting public school students. Protests and absenteeism also prompted middle class families to send their children to private schools.

However, movementism had advantages. Teachers were not tainted by association with party politics. Union leaders claimed the mantle of not being a part of the corrupt political class. Unlike other Argentine unions, leaders of CTERA did not take patronage positions in public office, and by large they were not strongly represented in the education bureaucracy. Teachers resided outside party politics. They were not accused of politicizing education, and they even mobilized against corruption. Movementism gave teachers some legitimacy, since teachers could claim to be outsiders who made a legitimate set of demands. As such, they were able to sustain their demand-making repertoire, and they enjoyed public support.

In sum, recurrent protests, rather than demonstrating union strength and dominance, suggest weakness. Unions that rely on protests lack other channels of political influence. Movementism gives rise to a vicious circle, as was evident in Argentina. Teacher grievances fueled recurrent protests. However, policymakers negotiated the smallest possible concessions necessary to end labor conflicts, since large concessions might raise expectations in future labor disputes. Politicians sought to manage teacher protests, since they knew they were unavoidable. The management strategy meant that there was reluctance to embrace a comprehensive set of policies to improve teacher salaries. Argentina is a case that is the opposite of the “vested-interest” model; teachers did not get rents and the union was relatively free of corruption.

**Leftism.** In contrast to movementist unions, leftist unions had more access to policy makers. And when their partisan allies governed, they had significant influence. Rather than exerting external pressure on policymakers through protests, union leaders became the policymakers. Parties recruited union leaders as political candidates, and unions had “group delegates” in public office to represent the interests of teachers (Siavelis and Morganstern 2008, 23). These delegates formulated the education agenda. Leftist unions were centrally organized and powerful enough to mobilize their left-leaning base in the electoral arena. This enabled them to install their own people in high-ranking government positions under leftist governments.

When leftist parties govern, at the municipal or at the national level of government, leftist teachers’ unions exert strong influence on policy. In Colombia, the union played a major role in education policymaking in the 1990s, during the pro-labor government of President Ernesto

Samper, and in the municipal government of Bogota. Because leftist mayors in Bogota were elected in 2003, 2007, and 2011, union leaders held leadership positions in the Secretariat of Education, and, riding the coattails of mayors, also entered the city council. Spending on education increased dramatically, and pro-teacher policies were adopted, including expanded teacher training, improved compensation, and social programs for low-income students. Public schools were favored, while charter schools and publicly funded private schools lost resources. With a left party in government, the union advanced its own policy agenda. Within Colombia, Bogota became a sort of teacher utopian, because of the strong ties to a leftist administration.

In terms of overall policy influence, however, leftism produced mixed results. In countries that had strong left or labor-based parties that governed for long periods of time, such as Brazil and Chile, teachers had significant, sustained influence. However, in countries that had small left parties that resided in the opposition, such as Colombia and Ecuador, teachers had intermittent influence. In these countries, teachers' unions were relegated to the opposition for the most part. When the partisan allies of unions are blocked from joining the governing coalition, electoral mobilization yields limited benefits, since the partisan allies of unions cannot set the agenda.

The characteristic policy-making pattern for leftist unions consisted of significant negotiations and exchanges with aligned parties. Indeed, labor-based parties that allied with teachers' unions delegated the entire education agenda to union leaders. At the same time, leftist unions developed antagonistic relations with other parties, which precluded negotiation and political exchange. This created a dynamic in which, when their partisan allies were out of government, unions were marginalized. Teachers in the opposition often mobilized protests, but these protests were not very effective.

In Colombia, ideological distance made the teachers' union unavailable as a coalition partner to right-wing parties. As a result, non-left parties adopted an education platform that teachers strongly opposed. The Liberal and Conservative parties, along with the more recently formed parties, i.e., Partido de la U and Centro Democrático, embraced teacher evaluations and merit-based promotion schemes, which the unions abhorred. Since the union would never support these parties no matter what they did, the parties were indifferent to teacher opposition. In Colombia, the union had subnational policy influence, where left parties governed, but limited influence at the national level, since left parties were only a small legislative fraction. This contrasts with the "vested interest" model, in which teacher influence is constant, and incrementally strengthened over time.

**Instrumentalism.** Instrumentalism produced disproportionately high policy influence among teachers' unions which made them resemble "vested interests." Unions that were movementist and leftist had characteristics that limited their access to policy makers. Indeed, movementist unions never had close ties to policymakers; leftist unions had, at best, conditional and intermittent access. However, instrumentalism enabled unions to maintain their influence indefinitely, no matter what party was in power. It involved a delicate dance of distancing the union from a party while at the same time making itself available as a potential coalition partner. This pattern emerged as teachers' unions defected from longstanding partisan allies and put themselves in a position to form new alliances as time and circumstances dictated. This dance

required that they avoid a complete severing of ties with the former ally, since the former ally may yet again return to power.<sup>35</sup>

Instrumentalism yielded substantial benefits for teachers. In Mexico, it brought consistent and dramatic increases in teacher salaries after the debt crisis of the 1980s. The union sustained negotiations with the national and subnational governments, no matter what party was in power. Because SNTE leaders claimed credit for delivering pivotal votes to politicians, governments of all political stripes gave union leaders significant policy concessions. Union leaders also capitalized on the instrumental negotiations of the union to extract private benefits. There was a revolving door between union leadership positions and appointed government posts, with union leaders frequently appointed to top cabinet positions.

Instrumental negotiations with multiple parties yielded enormous influence over education policy. The characteristic policy dynamic involved ongoing closed, insider negotiations between union leaders and government officials. These negotiations produced policy concessions, lucrative government contracts, and higher teacher salaries and fringe benefits. Political parties sought to negotiate with teachers in order to solidify their electoral position, and they avoided supporting education policies that teachers opposed. Presidents and governors moved away from policy positions that were at odds with the union, while union leaders serving in government restricted the set of policies that could make it onto the education agenda.

The downsides of instrumentalism, however, were significant, as seen in the case of Mexico. While the Mexican teachers' union was successful in raising teacher salaries, corruption began to spiral out of control. Revelations of the corrupt practices in the union by muckraking journalists and prosecutors ultimately resulted in the arrest of Elba Esther Gordillo in 2013. Instrumentalism stigmatized the union and tarnished its public image. Despite a sophisticated public relations campaign, the union was unable to cast off the pall of corruption and self-interest. Instrumentalism enabled Gordillo to concentrate power. While in many ways she was a skillful political operator, ultimately the constantly shifting alliances proved unsustainable, at least at the national level. Once the union lost credibility, it became isolated and weak.

### *Future Research*

This research has focused on the politics of teachers. Future research could examine the politics of education, more broadly, and bring in a broader array of political actors. A second question that comes out of this research is how the political participation of public sector workers should be regulated in developing democracies.

### Elite Mobilization Against Teachers

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<sup>35</sup> There are multiple cases of movementist teachers' union (especially in the past) and leftist teachers' unions (especially in the contemporary period), but cases of instrumentalism are more difficult to find. Non-teachers' unions that fit this profile include the teamsters in Argentina, where Hugo Moyano became a powerful labor boss who shifted his political support. Instrumental activism may be uncommon among teachers.



Other political actors also shape education policy, especially business interests and technocrats that push back against the interests of teachers. New economic growth models strongly emphasize education and human capital accumulation. Business leaders have voiced concern about whether public school teachers are giving students the skills necessary to compete in the knowledge economy. Throughout the Americas, business leaders have founded think tanks and policy advocacy organizations in order to counterbalance teachers' unions. These business-sponsored organizations are the primary producers of research and policy papers on education reform. They also generate cohorts of lobbyists who press for greater transparency in public school systems and more rigorous teacher evaluations. More research is needed on how private foundations, media strategies, elite networks, and lobbying strategies influence education policy in a direction that teachers strongly oppose.

In addition to business elites, technocrats have also targeted the public school system. Technocrats are policy experts with specialized training who seek to improve public administration. Concerns about wasteful spending, especially on teachers who are chronically absent and subsidies to teachers' unions, have empowered technocrats to adopt new policies. Technocrats have strongly embraced the policy blueprints of international organizations, such as the World Bank, IADB, and other development agencies. Further work is needed to look at how technocrats have connected to parties, and influenced policy paradigms and ideas about education reform, although the lines of the power to set the agenda and to influence elite decision-making.

As research on critical junctures and their legacies has been shown to produce "reactive sequences" (Mahoney 2000), research on education policy dynamics should examine the interplay between teacher mobilization and different forms of counter-mobilization that it can fuel. For instance, in Mexico the instrumental strategy and disproportionate influence the union exerted from 2000 to 2006 seemed to generate a reaction by business elites, who founded a prominent education think-tank, *Mexicanos Primero*, that was dedicated to pushing forward policies that the union opposed. Similarly, in Colombia, the union's success during the 1990s in advancing its interests prompted economic think tanks, such as *Fedesarrollo*, to take on the issue of education, to lobby hard for a set of policies that the union opposed. In Argentina, business elites seemed less focused on education, since the union never exerted disproportionate influence on policy. Analytically, it is important to explore how leftism and instrumentalism may generate a conservative backlash; movementism may generate less extreme reactive sequences.

### Political Rights and Public Sector Workers

Another question this research raises concerns how public servants should participate in politics. Analysts who are associated with the political right have given more attention to this issue than those on the left. Daniel DiSalvo's (2015) book, *Government Against Itself: Public Union Power and Its Consequences*, presents a scathing critique of public sector unionism. Terry Moe's book (2011) *Special Interest* advances a similar argument. The claim is that public sector unions have privileged access to state resources, and certain key governing responsibilities, which make them powerful, and unaccountable. Conflicts of interest inevitably emerge, because these unions use public resources to advance particular, private ends. The claim is that public

sector unions need more scrutiny and regulations, in order to prevent excessive politicization and conflicts of interest.

This literature is controversial but it makes a major contribution. There is a gaping hole in political research on how employees of the state *should* participate in politics. Despite an interest in how bureaucrats engage in politics (Geddes 1994) and public sector patronage (Oliveros 2016), the political activism of public employees has received very little scholarly attention.

This means that important normative questions about how teachers and other public employees should participate in politics are not posed. Authoritarian and closed electoral regimes imposed restrictions on the political participation of teachers. In Mexico during authoritarian rule, teachers were automatically affiliated to, and obligated to vote for the PRI. A democratizing step was to end the automatic affiliation of teachers to the PRI, in order to guarantee partisan freedom (*libertad de militancia*). In Colombia, teachers were proscribed from participating in political campaigns, and they were forbidden from supporting leftist parties, although these measures had limited success in generating the desired outcome. Democratizing reforms in Colombia enabled teachers to participate in politics and support whatever party they wished.

From the standpoint of democracy, arbitrary restrictions on the political rights of public employees are undesirable. They disenfranchise large groups of citizens. There is no justification for teachers to be denied political rights that other citizens have. In the era of neoliberalism, teachers need to exercise political rights in order to defend labor rights. Teachers are a group that has historically been subject to arbitrary patronage practices. Restrictive rules governing teacher participation are undemocratic, and they may induce teachers to take part in militant activities. When countries democratized and signed onto international labor conventions, they abolished arbitrary restrictions on public sector worker participation. Indeed the state sanctions union representation in many Latin American countries. The state regulates how many “licenses,” a union has, or the number of paid teachers who take a leave of absence and work for the union.

On the other hand, because of the particular policy structures that govern teachers and the hierarchical organization that organize them, it would be naïve to think that conflicts of interest do not exist. In some democracies, such as Colombia, certain groups are not allowed to participate in elections, such as active military personnel, in order to avoid politicizing and de-professionalizing the officer corp. Similarly, there are fears that public servants who have discretionary power over state resources might use them to pursue public office. In Colombia, public servants must leave their position for a year before they are eligible to be political candidates, in order to avoid conflicts of interest.

What rules then should govern how public sector workers participate in politics and clarify conflicts of interest? Unions often impose rules on themselves, they usually forbid union leaders from simultaneously holding a position in the union leadership and holding public office, although this policy does not avoid politicians from placing their loyal cadres in the union leadership. There are also a variety of questions teachers have, which the ministry of education answers in a public forum, about the dos and don'ts of political participation and taking a *comision sindical*. The attorney general in Colombia also prosecutes teachers who do not leave the teaching profession after assuming public office. In Argentina union leaders simultaneously

serve as heads of teachers' unions and legislators. However, this is not common and raises questions about whose interests they serve. On other hand, in Colombia union leaders formally leave the union but *de facto* remain tied to the union and exercise influence within it. There are clear rules about when union leaders blatantly use their control over resources in the education sector for political ends. However, there are more informal relations that can develop that are harder to detect that might also raise concerns.

There is little clarity about how public servants should participate in politics. Arbitrary restrictions on the political rights of public servants are undesirable and undemocratic. Yet public servants may abuse their official power and support political allies. More thinking is needed on the rules, regulations, and norms that should govern public sector participation, in order to avoid conflicts of interest that arise when public sector workers exercise democratic rights.

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