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# Education reforms and teachers' unions: avenues for action

Denise Vaillant

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## Fundamentals of educational planning

The booklets in this series are written primarily for two types of clientele: those engaged in educational planning and administration, in developing as well as developed countries; and others, less specialized, such as senior government officials and policy-makers who seek a more general understanding of educational planning and of how it is related to overall national development. They are intended to be of use either for private study or in formal training programmes.

Since this series was launched in 1967 practices and concepts of educational planning have undergone substantial change. Many of the assumptions which underlay earlier attempts to rationalize the process of educational development have been criticized or abandoned. Even if rigid mandatory centralized planning has now clearly proven to be inappropriate, this does not mean that all forms of planning have been dispensed with. On the contrary, the need for collecting data, evaluating the efficiency of existing programmes, undertaking a wide range of studies, exploring the future and fostering broad debate on these bases to guide educational policy and decision-making has become even more acute than before. One cannot make sensible policy choices without assessing the present situation, specifying the goals to be reached, marshalling the means to attain them and monitoring what has been accomplished. Hence planning is also a way to organize learning: by mapping, targeting, acting and correcting.

The scope of educational planning has been broadened. In addition to the formal system of education, it is now applied to all other important educational efforts in non-formal settings. Attention to the growth and expansion of education systems is being complemented and sometimes even replaced by a growing concern for the quality of the entire educational process and for the control of its results. Finally, planners and administrators have become more and more aware of the importance of implementation strategies and of the role of different regulatory mechanisms in this respect: the choice of financing methods,

the examination and certification procedures or various other regulation and incentive structures. The concern of planners is twofold: to reach a better understanding of the validity of education in its own empirically observed specific dimensions and to help in defining appropriate strategies for change.

The purpose of these booklets includes monitoring the evolution and change in educational policies and their effect upon educational planning requirements; highlighting current issues of educational planning and analyzing them in the context of their historical and societal setting; and disseminating methodologies of planning which can be applied in the context of both the developed and the developing countries.

For policy-making and planning, vicarious experience is a potent source of learning: the problems others face, the objectives they seek, the routes they try, the results they arrive at and the unintended results they produce are worth analysis.

In order to help the Institute identify the real up-to-date issues in educational planning and policy-making in different parts of the world, an Editorial Board has been appointed, composed of two general editors and associate editors from different regions, all professionals of high repute in their own field. At the first meeting of this new Editorial Board in January 1990, its members identified key topics to be covered in the coming issues under the following headings:

1. Education and development.
2. Equity considerations.
3. Quality of education.
4. Structure, administration and management of education.
5. Curriculum.
6. Cost and financing of education.
7. Planning techniques and approaches.
8. Information systems, monitoring and evaluation.

Each heading is covered by one or two associate editors.

The series has been carefully planned but no attempt has been made to avoid differences or even contradictions in the views expressed by the authors. The Institute itself does not wish to impose any official doctrine. Thus, while the views are the responsibility of the authors and may not always be shared by UNESCO or the IIEP, they warrant attention in the international forum of ideas. Indeed, one of the purposes of this series is to reflect a diversity of experience and opinions by giving different authors from a wide range of backgrounds and disciplines the opportunity of expressing their views on changing theories and practices in educational planning.

This document deals with teachers' unions and their role in the implementation, or hindrance, of reforms in Latin America. It contains a few recommendations for policy-makers on the need for more meaningful talk and work with the unions. Many reforms are needed to improve the quality of education; to better gear it to the characteristics of the early twenty-first-century societies; and to make it more effective and better able to factor in the diverse needs and aspirations of pupils. Educational quality very largely depends on the teachers: on their levels of knowledge, their feel for teaching, their contact with pupils, their dedication and, more generally, their professionalism. Successful implementation of education reforms requires the support of teachers for an educational plan; hence, dialogue with teachers' representatives is essential. Many reforms have failed because they did not have the backing of teachers. Understanding teachers, the way they operate and their goals is a foremost concern for educational planners, managers and decision-makers in order to communicate effectively with them.

Relations with the unions depend greatly on the countries and their traditions: whether there is a *closed shop* or not; the links between unions and political parties; membership; and so on. This paper draws on examples taken from Latin America where such relations have been fraught with much conflict over recent years. Denise Vaillant is well acquainted with the issue of teachers and the need to talk to their unions as she has contributed greatly to the preparation and implementation of education reforms in Uruguay over the last 15 years. While giving the viewpoint of the decision-maker,

she provides very valuable insights into this area. She also speaks candidly and knowledgeably of the problems on both sides and – while not claiming to have the miracle solution – sets forth some recommendations for decision-makers on how to conduct negotiations.

It is intended to supplement this issue in the series by another giving the views of the unions or presenting the situation in a region where relations are perhaps less conflictual.

Gudmund Hernes  
Director, IIEP



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## Preface

The educational landscape in Latin America has undergone considerable change over the last 20 years or so. These developments have been the result either of sweeping reforms or of minor adjustments. Some countries were ahead of the others and therefore required less radical overhauls; conversely, other countries first had to overcome crises or recover from situations of long and steady deterioration. Even now, some countries are lagging so far behind that despite the changes the gaps are still enormous. Quite often, the countries on the tail end are precisely those that find it most difficult to get ahead.

However, the move to transformation is a long and hard operation – which explains why many countries have not made any real progress. They have often stopped at merely paying lip service to change without being able to translate their words into concrete action; hence, the extent of genuine educational change observed over recent decades in the hemisphere is remarkable.

Looking at what has and has not changed, a number of definite trends are clearly discernible. Generally, it appears easier to act on quantity than on quality. Several countries have succeeded magnificently in boosting enrolments and lengthening the duration of schooling. Pupil numbers at the end of each cycle have grown markedly. Several countries are posting high educational-coverage figures both in secondary and higher education. Therefore, in some countries quantity is no longer the main target.

Unfortunately, the same cannot be said of quality. In absolute terms, international evaluations such as TIMMS, IEA and PISA have systematically shown that Latin Americans receive lower-than-average education. In fact, it would be more accurate to say that the achievement levels of Latin American countries are lower than those reached by other countries of comparable per-capita income.

Consequently, it can be reasonably assumed that on the whole, Latin America has gone from a situation where educational coverage and quality were poor to one in which coverage is broad, quality is mediocre and access is very uneven. Hence, now the focus must be on improving quality. This must be the overriding priority.

Current knowledge tells us that quality depends directly on teaching, which in turn depends directly on the teacher. As the other problems have been solved, now we must concentrate on the teaching profession which, it would appear, is the weak link.

Many attempts have been made to upgrade teachers and their teaching. However, perhaps in Latin America more than elsewhere, teachers are hard to manage as a social group, for they are often discontented, sometimes with good reason. Driven by a feeling of helplessness, they organized into unions, which then took on their own *modus operandi*, sometimes running counter to the positions, needs and preferences of individual teachers.

Ideology runs almost right through the unions and their negotiations with the political establishment. Tough confrontations have occurred and are occurring everywhere, to such an extent as to frustrate the implementation of urgently needed reforms. In one country, strife with the teachers' unions was so violent that a state of siege was declared.

Denise Vaillant, professor of education policy at the University of the Republic of Uruguay, is co-ordinating the PREAL<sup>1</sup> working group on teachers in Latin America. She has vast experience of teachers and teacher-training colleges. Through her participation in the introduction of the education reform in Uruguay, she was in the best position to write this paper on Latin America, in which she describes the methods used in these countries, their objectives, and the most effective strategies to defuse conflicts and develop solutions tailored to both the education system and the teachers.

1. *Programa de Promoción de la Reforma Educativa en América Latina y el Caribe* – Partnership for Educational Revitalization in the Americas.

This is a difficult subject, which is doubtless why so few endeavours have been made to understand teachers' unions. Denise Vaillant has greatly contributed to a better understanding of teachers' and unions' standpoints. We wish to congratulate her on the efforts and energy she has devoted to this work and for the very interesting conclusions she shares with us here.

Claudio de Moura Castro  
Associate Editor



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## List of abbreviations

ADP	<i>Asociación Dominicana de Profesores</i> [Dominican Association of Teachers]
CEPAL	<i>Comisión Económica para América Latina y el Caribe</i> [Economic Commission for Latin America and the Caribbean]
COLPROSUMAH	<i>Colegio Profesional de Superación Magisterial</i> Hondureño [Professional College for the Advancement of Teaching in Honduras]
CTERA	<i>Confederación de Trabajadores de la Educación de la República Argentina</i> [Confederation of Education Workers of Argentina]
FLACSO	<i>Facultad Latinoamericana de Ciencias Sociales</i> [Latin American School of Social Sciences]
FUNDEF	<i>Fundo de Manutenção e de Desenvolvimento do Ensino Fundamental e de Valorização do Magistério</i> [Fund for the Development of Primary Education and Teacher Development]
IIEP	International Institute for Educational Planning
OCDE	Organisation for Economic Co-operation and Development
PDE	Ten-year education plan
PREAL	<i>Programa de Promoción de la Reforma Educativa en América Latina y el Caribe</i> [Partnership for Educational Revitalization in the Americas]

*List of abbreviations*

SNTE	National Union of Education Workers (Mexico)
UNESCO	United Nations Educational, Scientific and Cultural Organization
UTE	<i>Único dos Trabalhadores em Educação</i> [Union of Education Workers]

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## Introduction

Since the introduction of the reforms that typified the education systems of Latin America in the 1990s, conflicts between teachers' unions and governments have multiplied in many of the countries of the region. The new education policies have been vigorously rejected by part of the unions; hence, the reforms have produced only slender results and have not been able to bring about the root-and-branch transformation of education they were intended to.

In many cases, the education reforms put into effect throughout the 1980s and 1990s gave teachers more work and responsibilities; at the same time, the assimilation of new teaching methods and technical concepts compelled them to train and adjust to the new modes of teaching and organization so that they could perform their daily work. Hence, as stated by Tiramonti (2001: 16), “this state of affairs introduces a distinctly contradictory situation into the reform processes; on the one hand, they require highly professional work of the teacher while on the other, they leave [...] wages unchanged [...]”.

The aim of this monograph is to analyze the role of the unions in the context of the recent education reforms in Latin America and suggest some avenues for future action. The main aspects of the reforms, the characteristics of teachers' unions, the points of conflict that have emerged thus far and the exceptions to the rule will be presented successively. It was also considered important to propose strategies that may open up new approaches to participation, interaction and dialogue between unions and governments.

The relationship between governments and teachers' unions will be studied by looking into the ‘professionalization’ of teaching, especially by examining the strategies employed by this group of professionals to gain control of their activity but also to improve their economic and social status.

The issue of teacher professionalization has given rise to lively debate. It has focused variously on the technicity and the professionalism of teaching and on the strategies to enhance the image or social status of the profession. It is complex, for since it is closely bound up with a history, a culture and a society it cannot be approached through just one dimension. Generally speaking, *professionalization* refers to the process whereby an occupation or job becomes a profession requiring specific skills. While this concept of professionalization has developed primarily in English-speaking countries, in Latin America the notion is fairly new, especially as applied to teachers. It calls into question the representation of teachers as merely employees, and makes them professionals that possess a well-defined set of skills just the same as other professionals in the fields of science and technology.

This monograph is based on an analysis of the existing literature and particularly the various studies made over the last two decades on teachers and their unions in Latin America. Among the main sources consulted is the work done in the framework of the FLACSO-PREAL Working Group entitled *Proyecto de Reformas Educativas en América Latina*<sup>2</sup> and the documentation provided by the UNESCO-OREALC Latin America Teacher Training Network. This literature review revealed just how far Latin American countries lagged behind developed countries in this field. Thus, Murillo (1999) emphasizes that in the region, most of the studies into teacher unionism deal with Mexico. However, some (though fewer) inquiries have been carried out in Brazil, Argentina and Chile. This uneven spread of research makes it somewhat difficult to do comparative studies.

*Chapters I and II* present the distinctive traits of the education reforms in Latin America in the 1990s and the main characteristics of teachers' unions, their relations with government, and sub-regional trends.

*Chapter III* studies those education policies challenged by the unions, the most problematic aspects, the substance of the unions' cases and the decision-makers' viewpoints. This chapter will also deal with the various union grievances, especially their opposition to

2. "Project on Teacher Unionism and Education Reform in Latin America".

decentralization and privatization processes, as well as their desire to maintain a strong collective influence.

*Chapter IV* examines those cases in which negotiations were smooth and were later taken as benchmarks; it presents the lessons learnt from the alliances forged between unions and governments in the implementation of education reforms. An effort will be made to determine the ideal conditions for the design and execution of education policies, entailing committed participation of teachers' unions in the reform process, thereby furthering educational quality. Finally, in *Chapter V*, some recommendations for decision-makers are given.





## I. The educational transformation of the 1990s<sup>3</sup>

In the 1980s, and, more particularly, in the 1990s, the education systems of almost all the Latin American countries underwent major reforms. *Inter alia*, the reforms focused on the principles of quality and equity, the introduction of new educational content, teachers' in-service training, more self-management of schools, and the development of information and evaluation systems enabling more accurate decisions to be made on education policy.

**Table 1.1 Thrusts of education reforms in Latin America**

<b>Fields</b>	<b>Strategies</b>
Quality and equity	Targeting primary schools in underprivileged areas. Longer school day. Positive discrimination to benefit vulnerable groups.
Educational content	Renewal of course content. Project-based work. Modified textbooks.
In-service training of teachers	Improving the quality of training programmes. Professional-development programmes.
Management	Administrative and pedagogical decentralization. Greater autonomy of management at local level. Participation of parents and community.
Evaluation of learning	Improvement of evaluation systems. Nationwide examinations. Participation in international evaluations.

*Source:* Vaillant, 2004.

3. This chapter is based on Vaillant, 2004.

## *Principles of quality and equity*

In Latin America the investigations into the situation of education and the segmentation of education systems have shown that the opportunities of access were not the same for everyone and that if specific strategies were not developed to factor in such disparities in access and educational achievement, the inequalities may even worsen. The education reforms were supposed to improve the quality of education and aim at greater equity in the provision of access to the education system.

Several quality-improvement programmes were instituted with the aim of increasing the number of teaching hours, renewing teaching methods and techniques and concentrating teachers' work on low achievers. Innovations and transformations in teaching, along with an improvement in the working conditions of educators, were often developed for teachers working in poor districts or under difficult conditions.

Long before the 1990s, Mexico had been the first Latin American country to establish programmes to improve the provision of education in poor rural areas. This was done through programmes such as the CONAFE<sup>4</sup> community courses and distance secondary education (via television – *tele secundaria*). Throughout the last decade, many Latin American countries have taken various measures in the hope of improving education provision in the most disadvantaged sectors.

Many strategies have been blended into the most ambitious and wide-ranging reforms. These have included the distribution of textbooks and other learning materials, the creation of libraries, the loan of instructional aids, the repair of infrastructure, the expansion of in-service training for teachers and the increase in the number of teaching hours (an extremely important issue). Some of these programmes are well known internationally: for instance, Chile's 900 schools programme, which affords a set of low-achieving primary

4. *Consejo Nacional de Fomento Educativo* (CONAFE): national education-development board.

schools<sup>5</sup> the benefits of a whole series of actions designed, *inter alia*, to improve school infrastructure and train teachers.

Some countries have propounded programmes aimed at better meeting the needs of populations with specific cultural, social and ethnic characteristics; for instance, projects focusing on intercultural, bilingual education (in the mother tongue and the official language). Some such programmes have gone nationwide, as in Mexico, Bolivia, Ecuador and Paraguay.

Despite the efforts made, a systemic approach was often left out. The programmes set up were not always dovetailed with learning-outcomes evaluation, greater pedagogical autonomy, the promotion of innovations through recourse to competitive exams, in-service teacher training, or improvements of teachers' working conditions.

### *New teaching contents*

What should be taught? In other words, what should children and teenagers know? Both of these questions were posed and dealt with by the different groups of officials participating in the transformation processes. During the 1990s, several Latin American countries invested considerable human and material resources to overhaul study programmes. The most significant reforms were those of Argentina, Brazil, Chile, Costa Rica, El Salvador, Nicaragua and Uruguay.

Braslavsky (2000) distinguishes four types of innovations in Latin American curriculum reforms: content renewal, change of languages taught, the introduction of educational projects and the development of various programmes relating to youth vocational training.

Some study-programme reforms brought modifications to primary and secondary curricula. Under other reforms, new approaches were integrated into the study of a number of disciplines including language, mathematics, earth sciences and social sciences. It must also be

5. Selection is made in schools with poor learning outcomes.

mentioned that in almost all the Latin American countries, textbooks were produced and made available free of charge as part the new programmes.

One new programme feature is the inclusion of 'cross-cutting' objectives. They concentrate on values such as human rights, education for peace and democracy, gender equity, environmental protection, sex and health education, and consumer awareness.

To improve the quality of education processes, many reforms include a strong component for the development of 'learning resources'; for example the reforms in Chile, Bolivia and Mexico, whether system-wide or class-based, in educational establishments. The following table recaps the main curriculum reforms introduced in the region.

**Table 1.2 Curriculum reforms in some countries of the region**

<b>Country</b>	<b>Content of the reform</b>
<b>Argentina, from 1995</b>	Curriculum reform for primary and secondary education, national education law with new responsibilities for national and provincial governments
<b>Chile, from 1996</b>	New teaching contents, minimum obligatory contents for primary education, greater school autonomy
<b>Mexico, from 1992/1993</b>	Curriculum reform in primary and secondary levels beginning with the 1992/93 cycle, decentralization to state level
<b>Dominican Rep., from 1991</b>	National education law, curriculum reform, implementation of a new teacher-training programme
<b>Brazil, from 1996</b>	New national education contents for primary schools and the first four levels of Portuguese, mathematics, science, history and geography
<b>Uruguay</b>	Curriculum reform in primary and secondary schools, teaching of languages in public schools

**Table 1.2 (continued)**

<b>Country</b>	<b>Content of the reform</b>
<b>Costa Rica</b>	New study plans and programmes with the development of relevant teaching materials
<b>Guatemala</b>	National education law, adaptation of teaching contents, textbooks

*Source:* Vaillant, 2005, from Gajardo, 1999: 34.

Almost all the Latin American countries now have national curricula that have replaced outdated programmes and that in many cases have been taught for several decades. However, much remains to be done to reorganize the different fields of knowledge and improve textbooks and other teaching/learning materials. Furthermore, difficulties are being encountered in implementing the new models of teaching content. Some of these difficulties result from the lack of consultation with the unions when the new models were determined, but also because primary and secondary teachers were not given the training that would have enabled them to introduce the new content into their teaching. It must be stressed that classroom work is the prime area for the expression of union opposition: this is where teachers have the power and control to legitimize – or undermine – curriculum reform.

### *Initiatives to improve teaching*

Throughout the 1990s, most of the Latin American programmes that aimed at boosting quality and equity in primary and secondary education were accompanied by policies designed to improve teaching. The following table outlines the main programmes executed in the region.

**Table 1.3 Initiatives to improve teaching**

<b>Country</b>	<b>Strategy</b>	<b>Goals</b>
<b>Colombia</b>	National encouragement programme and special award for quality improvement	Reward the best teachers by way of a bonus amounting to 1.5 times the average monthly wage and acknowledge the best-performing teaching teams
<b>Chile</b>	Law on teacher professionalization, Excellence Award	Promote teacher stability and professionalization, provide non-pay incentives to encourage teaching excellence
<b>Brazil</b>	National fund for the development and preservation of primary education and for enhancing the status of the teaching profession (FUNDEF)	In-service training, increased time on lesson planning, minimum wage
<b>Argentina</b>	Federal network of in-service training	System comprised of institutions for the training of teachers
<b>Uruguay</b>	Improvement programmes for full-time primary teachers	Training to cope with school failure and the problems affecting disadvantaged children

Of the innovations designed to improve teachers' working conditions and promote their in-service training, the initiatives conducted in Chile are the most impressive. Starting in 1990, Chile ensured its teachers greater stability of employment, bolstered the professionalism of teachers and their trainers (law on the status of professionals), gave non-monetary incentives (Teaching Excellence Award) and created a special resource fund for teacher training, both domestically and abroad.

As of 1998, Brazil brought in a National Fund for the Development of Primary Education and Teacher Development (FUNDEF). The fund adopted strategies establishing a minimum wage for education

professionals. With 60 per cent of the fund devoted to the remuneration of teachers, the results of this initiative are encouraging since, after several years of operation, teachers' salaries have risen significantly.

The law by which FUNDEF was created also set a period of five years for teachers to obtain the necessary certification to teach. Funds are set aside for the initial training of unqualified teachers; that is, who teach without having received any training. Here also, results have been good, as the number of untrained primary and secondary teachers has fallen steeply.

Argentina is an interesting case. From the mid-1990s, the establishment of the federal network of in-service training has provided the resources needed for teacher professionalization. In 1997, Uruguay also brought in a training programme aimed at full-time primary teachers or teachers working in particularly underprivileged areas; it is designed to solve the problem of early scholastic failure.

While it is true that all of these programmes have helped improve teachers' working conditions and training, many reforms have not been able to modify teaching practices, which still conform to the old face-to-face teaching models originally learnt by the teachers.

### *Decentralization of educational management*

As regards decentralization and management, the main goal of the reforms has been to shift responsibility for public affairs to the provincial governments and the municipalities. The partisans of decentralization criticize the centralist model for overlooking the diverse needs of local and regional echelons in the decision-making process. Indeed, several authors are of the opinion that blanket solutions applied across the board to an array of contrasting real-life situations cause greater inefficiency in the use of resources and are largely ineffectual in reaching the set objectives. Decentralized institutions are considered more sensitive to the needs and demands of the population and have a greater ability to innovate and facilitate citizen involvement in decision-making.

In Latin America, several education ministries have justified decentralization reforms by contending that they ensure greater accountability of the apparatus of government; thereby improving the accountability processes in the education policy. However, the advantages of decentralization policies have hardly been confirmed. Unequal access to resources and the uneven availability of local technical and administrative capabilities call into question the validity of decentralization; in the medium term, it appears to increase inequalities in the education system and cause greater fragmentation of reform initiatives.

Of the Latin American countries, Argentina was the first to begin a process of decentralization: long ago, it gave political and administrative powers to the provinces. In the Bolivian decentralization reform, authority and financial resources were devolved to the departments<sup>6</sup>, districts and 'hubs' (*nucleos*, that is central schools surrounded by five or six satellite schools). Chile decentralized the administration of its system in the 1980s; school management was transferred to the municipalities, who were authorized to administer, manage and recruit teaching staff (*inter alia*, Hannaway and Carnoy, 1993).

In Brazil, primary education now comes mainly under municipal authority. There are almost 5,000 municipal education secretariats, which are autonomous except in the passing of legislation, setting the number of periods in the school week and determining course content. Secondary education is under the authority of the 27 state education secretariats.

During the 1990s, one of the strategies used by some countries of the region was to promote the participation of local communities in education and in the management of other public affairs. There were several experiences of this sort, especially in countries accustomed to decentralized management such as Brazil<sup>7</sup>, Colombia<sup>8</sup>, Chile, Bolivia

6. Name given to administrative units in Bolivia.

7. Particularlry in the states of Rio Grande do Sul, Paraná and Minas Gerais.

8. See the study by Reyes (2001) on the management of education processes in Colombia.



and Paraguay. In some cases, citizens' participation in education helped to promote universal coverage. This was true of El Salvador with its community-managed schools programme (*Educación con participación de la comunidad*, EDUCO) and Guatemala with the national self-management programme for educational development (*Programa Nacional de Autogestión para el Desarrollo Educativo*, PRONADE). In Nicaragua, citizens' participation in the education process has made the use of public funds more effective and helped to heighten school efficiency.

Despite these changes, decentralization and participation by the civil society have only been able to produce fragmented change. In many cases, municipalities and provincial governments have held on to their bureaucratic structures. Furthermore, the decentralization process often relies on local units that do not have the technical capability to manage education policies or create the necessary spaces for participation. Finally, it is often the case that local communities see no advantages in participating in decentralization efforts as they have other priorities and would rather leave educational management to the local government authorities.

### *Progress in the field of evaluation*

By now, Latin America has acquired genuine experience in the area of evaluation. Some of the outcomes of this have been published and disseminated. Various studies have identified the school and non-school factors that matter the most in successful learning. Most Latin American countries, often with the backing of international bodies, have decided to apply various instruments to measure and systematically evaluate learning achievements nationwide, the goal being to monitor the education system and to gain the information required by society.

Although Latin American countries have evaluated learning outcomes for several decades, truly apparent progress has only been discernible from the 1990s. Already late in the 1970s, the Programme of Joint Studies on Latin American Economic Integration (*Programa de Estudios Conjuntos para la Integración Económica*

*Latinoamericana*, ECIEL) had performed a comparative analysis of learning outcomes in five countries using the instruments developed by the International Association for the Evaluation of Educational Achievement (IEA).

This involved several Latin American countries in the international evaluations lead by the International Association for the Evaluation of Educational Achievement and the Educational Testing Service (ETS) (*inter alia*, Wolf, 1998). In 1997, with the support and co-ordination of the UNESCO Regional Office, an evaluation of learning outcomes in mathematics and languages was performed. It covered children from 13 countries enrolled in grades three and four. As well, a few countries from the region are taking part in the international achievement evaluation of the Programme for International Student Assessment (PISA)<sup>9</sup>.

### *Reforms and outcomes*

As already observed, throughout the 1990s most Latin American countries gave new impetus to educational transformations. This helped improve the situation of the current education system. Take Brazil for example, where primary-education indicators show the vast progress made over recent decades (Rodríguez and Herrán, 2000; De Moura Castro, 2003). During the 1980s, the average Brazilian adult had had less than four years of schooling; only one half of the population completed primary, and 17 per cent reached the end of secondary. By the late 1990s, the average length of schooling for the whole population had reached 6.5 years; access to primary education was practically universal; one in two went on to secondary school; and one third of those pupils completed secondary. However, the major improvements to primary schooling have placed a heavy burden on secondary education, where enrolment demand is rising by more than 500,000 per year.

9. Several Latin American countries are participating in PISA, set up by the Organisation for Economic Co-operation and Development (OECD). Some of the countries joined in 2001 and others in 2003.

In brief, an examination of education in Latin America shows – first and from the institutional viewpoint – the increase in administrative decentralization and the emergence of new agreements on education. On the strictly pedagogical plane, major curriculum changes are taking shape, and programmes designed to boost quality and equity in primary and secondary education are now in place. Longer school days are being tested, and it is thought that specific programmes aimed at vulnerable groups will ensure that equity is secured. Evaluation of learning outcomes is now perceived as an important principle.

Despite all the work accomplished, much remains to be done. Educational achievement is still inadequate and raises questions on the choices made in education policies. The efforts made so far have failed to develop education to the extent required by the countries of the region. In practice, the actual situation of education has proven difficult to transform.

Inequalities in the spread of access to education persist and achievement remains low. Repetition and drop-out rates<sup>10</sup> are two of the most pressing problems. The negative consequences of repetition are well known: multiple repetition puts different age groups into the same class and causes early dropout. This is at great cost to education systems<sup>11</sup>.

Institutionally, political obstacles are hindering progress towards effective and modern administrative management and towards new ways of financing education. In Latin America, few countries are in a position to adjust to the challenges of the emerging situation. Throughout the last decade of the twentieth century, the yearly increase in gross domestic product was hardly more than 3 per cent, just one percentage point higher than in the ‘wasted decade’ of the 1980s. Added to the problems of poverty (affecting 44 per cent of the

10. According to the latest Education For All monitoring report (2005), in several countries over 20 per cent of the pupils who enter schooling do not complete year five. Repetition in primary school tops 8 per cent, and even 25 per cent in Brazil.
11. Torres (1999) claims that each year 32.2 million primary and secondary pupils repeat, at an annual cost of 5.2 billion dollars.

population), extreme poverty (affecting 19 per cent)<sup>12</sup> and blatant inequalities in the distribution of income are the henceforth new challenges arising from the technological revolution and globalization.

All diagnoses of the situation of Latin American education indicate that as regards quality and equity the promises have not been kept. The studies have highlighted: the gap between public and private schools and the ensuing difference in achievement levels; high repetition rates; early dropout and low achievement among the poorest populations; over-centralization and a lack of school autonomy; poor working conditions for teachers and difficulties in attracting young people to the profession; learning programmes that do not ensure the acquisition of indispensable life skills; and, finally, insufficient funding<sup>13</sup>.

In many Latin American countries, too little importance was given to the key role played by teachers in the implementation of the reforms introduced in the 1990s (*inter alia*, Palamidessi, 2003; Tiramonti, 2001). Those reforms stressed institutional factors, often overlooking teaching practices.

Which modifications need to be introduced into educational practice to improve the quality of the skills and abilities acquired by school children and youth? And how? The main agents of educational change – the teachers – need to be factored in first. The implementation, application and success of reforms depend on the people who work in the classroom day in day out.

12. The concepts of poverty and extreme poverty are the subject of broad debate concerning the national and international criteria applied. Here, *poverty* means the situation of deprivation affecting people who cannot even reach minimum living standards in accordance with the social norms of each context. The *extreme poverty* line is determined by the costs structure, and people are considered extremely poor if their income is lower than the 'food basket' (an individual's calorie consumption, generally around 2,000 calories per day).
13. Naturally, these general considerations do not reflect the differences that exist between countries, education systems and schools.

### *Changes, teachers and unions*

In developing countries, teachers are by far the largest category of civil servants. In Latin America, the teaching profession includes millions of people and, even in small countries such as Uruguay, represents a very high proportion of not only civil-service jobs, but of the job market as a whole. This makes education very different from the other sectors of public administration and a matter of great importance in the current context of the reforms that government is undergoing in Latin America.

At present, public-sector reform seeks primarily to reduce the functions carried out by government. However, the reforms also involve other aspects, such as extending accountability by engaging the civil society in decision-making and greater scrutiny of the running of the country. With things as they are and bearing in mind the wide variety of institutional formats and traditions in Latin America, the outcomes of the combined reforms – in education systems plus public sectors – have yielded situations in which the decrease in the number of public servants is not seen as one of the main goals.

Teacher numbers continue to increase as educational coverage expands. At the start of the twentieth century, Latin America had over seven million teachers working at the different levels of the formal system<sup>14</sup>. In addition, there were many teachers providing education in languages, art and crafts. These were teachers working in a network of diverse institutions and their number has not yet been entirely assessed. In Brazil, some initial estimates suggest that there may be more teachers working in non-formal education than in the formal system. These results show that urgent policies are needed for a body of teachers whose working and training conditions have not always been considered in education reforms.

14. The figures on school education are striking: over three million primary teachers, of which one third were to be found in Mexico and Brazil. This was over 5 per cent of all educators from the different educational levels worldwide, and 14 per cent of the primary teachers from the five continents.

*Education reforms and teachers' unions:  
avenues for action*

As the central government is generally responsible for educational finance and administration, national teachers' unions at national level have an important role to play in the framing of the national policy. If the rules of play are not established and if governments and unions cannot agree on teachers' working conditions, industrial action may hamper the process of education reform and even cause a political blockage.

In some cases teachers' unions have vigorously opposed the changes and reform processes proposed by government. Usually, this opposition was triggered by the fact that the transformation meant a change in the traditional rules of the game within the education system; for instance, teaching positions were no longer considered 'hands off'.

In short, the education reforms of Latin America in the 1980s and 1990s encouraged a series of changes that had direct repercussions on teachers and their unions. These impacts conditioned the positions adopted by teachers on all of the transformations. Initiatives aimed at improving education by way of initial and in-service training programmes were not always accompanied by salary increases and improved working conditions. Many of the reforms also were designed to change the management structure of education systems, which brought a loss of union influence at all levels.

## II. Teachers' unions

Teachers' unions in Latin America have undergone widely varying changes and show sizeable differences. From the perspective of the way they operate as an organization, they do not make up one uniform category. This is due to territorial reasons but also to the category of teachers they represent. Other, more conceptual criteria – such as the way in which unions work or enter into conflict with government in the formulation of education policies – also reveal a diverse and disparate panorama. The features of the unions operating in the region can be summed up as follows:

### *Shared characteristics*

It is not easy to examine and analyze the teachers' unions of Latin America. Differing economic, political and social realities, added to the differences in the ways the education systems of the various countries are structured, have spawned a wide variety of union organizations. Nonetheless, on the basis of the most salient characteristics, analysis of the literature reveals a general profile.

Essentially, union members are primary and secondary teachers working in the public subsystem. Although they allege they are autonomous and independent, most of the unions are part of broader confederations.

Their internal operation is determined by the standards applying to the election of their governing bodies. In general, such elections are held at two different levels, from the smallest unit (say, the educational centre or the locality) right up to the national level. Most often, the highest authority is a collective body elected directly by the members or by members' delegates.

Ibarrola and Loyo (1999: 6) emphasize that: “As internal democracy is one factor that gives legitimacy – both internal and

external – to trade unions and associations and strengthens their position in the public domain, it is well established at the formal level, but is very unevenly developed in the union organizations of the region. It can happen that democratic regulations are far removed from the actual conditions in which the unions really operate”. However, although political and cultural traditions diverge widely, the way in which many teachers’ unions operate reflects the *modus operandi* of the political and social organizations of the countries of the region. Despite their democratic and legal trappings, the unions tend to adopt corporatist practices and cronyism – which sometimes hinders effective participation by members.

Tackling the issue of cronyism and unions is not an easy task given the difficulty in assessing the extent of the problem. Cronyism customarily has been considered as a sort of informal distribution of multifarious services and benefits in exchange for electoral support.

In Latin America, cronyism affects all institutions, including those of the civil society, and hence trade unions. Some unions even operate on the basis of cronyism in that they hold a captive ‘clientele’ (their members), thereby enabling union officials to remain at the helm.

Another feature of the Latin American unions relates to the fact that many are funded by membership fees (generally 1 per cent of members’ basic pay). This enables them not only to maintain a skeleton central structure, but also to propose other benefits such as health services, training, refresher courses and recreational activities. The teachers’ unions of Latin America vary greatly in terms of their property, wealth and funding capabilities as this all depends predominantly on the size of membership and the regularity of members’ contribution payments.

Some unions are very affluent financially and eminently capable of providing services. Such is the National Union of Education Workers (SNTE)<sup>15</sup> in Mexico that owns buildings, cultural centres, sports clubs and hotels. On the other hand, there are also unions with few members

15. For a thorough analysis of the SNTE, see Arnaut (1992, 1998) and Loyo (1999).



or which do not receive regular payment of members' dues. They hardly have enough to cover even low running costs and overhead. For example in Guatemala, the unions find it difficult to meet the needs of even an elementary administrative structure (Ibarrola and Loyo, 1999: 17).

It must be underscored that the unions do not have much contact with their counterparts in the various countries of the region. However, regional groupings, such as the Confederation of Educators of the Americas or Education International, have been set up to frame a common approach.

Currently, several union organizations from different countries have developed networks to train their officials; it would appear that these co-operative exchanges have been formalized to quite some degree and will become standing arrangements. One interesting training initiative has been undertaken by the Latin American Workers' University (*Universidad de los Trabajadores de América Latina*, UTAL), a tertiary study and research centre concentrating on non-formal education, which has become an instrument for the training of officials from the Latin American Workers' Confederation (*Central Latino Americana de los Trabajadores*, CLAT). Another interesting initiative is the Thematic and Methodological School Plan (Plan ETM) that came into being within the International Confederation of Free Trade Unions<sup>16</sup> and trains trainers in union education.

### *Distinguishing features*

In contrast to some shared characteristics, Latin American union structures clearly differ in some respects. On one hand, and not considering the large number of basic services (holiday bonuses, medical services, child-minding, funeral undertakers, burial services, paid holidays) teachers' unions offer their members, in various ways they also provide their members with vocational training. Thus, in some countries the unions have included the professional development

16. This is a regional, inter-American workers' organization.

of teachers (in-service training) as one of their basic functions, while in others training merely focuses on union issues or is simply not provided.

Vocational training has become very important among unions in Colombia, Argentina and Costa Rica. To take the last two countries, in Argentina the Confederation of Education Workers of Argentina (*Confederación de Trabajadores de la Educación de la República Argentina*, CTERA) has developed a special centre for the vocational training of teachers, and in Costa Rica various union organizations have set up vocational-training centres for their members. In other countries such as Mexico, the SNTE maintains that teachers' vocational training should be provided by the employer, while keeping open the possibility of generating initiatives to develop vocational training within the union (Ibarrola and Loyo, 1999: 18).

The teachers' unions of the region also present significant differences as regards their ability to negotiate validly with government. This capability is conditioned by a number of factors as varied as the splits among the union structures, the varying levels of professionalism of the unions and their links with other influential players in the political system (Grindle, 2004).

There are few formal channels guaranteeing union participation in the formulation and assessment of education policies. The ways and means chosen in the different countries to build formal machinery for union participation are varied, as will be seen later in the booklet.

In some cases the mechanisms are highly formalized, while in others contacts between government and unions occur very informally. For instance in Mexico, the SNTE is very active in the implementation of education policy. The negotiating framework is often laid down in legalization and is guaranteed by accords reached with the government in 1992. Conversely, in Costa Rica there is no formal obligation guaranteeing union input in decisions on education policy. Therefore, in Costa Rica formal consultations are limited to work-related issues in the personnel department of the Ministry of Education (Ibarrola and Loyo, 1999: 22).

### *Size of membership*

The size of membership gives an idea of the significance of union organizations in Latin America (Loyo, 2001). The largest union of the region is the SNTE (Mexico) with 1,200,000 members. It includes about 800,000 teachers, the rest of the membership being made up of administrative staff and technicians working in the education system. Union membership is practically compulsory given the union's legal status – established when it was founded in 1943 – as an organization of employees from the secretariat of public education.

Another large organization is Brazil's National Confederation of Education Workers (CNTE), which claims 700,000 members and includes teachers' organizations from all levels of the education system from 27 of the country's states.

There is also the CTERA, which brings together various rank-and-file organizations from over 20 provinces, representing about 200,000 teachers out of a total membership of almost 700,000. It should be noted that in Argentina, university professors have separate representation. For its part, Chile's College of Teachers (*Colegio de Profesores*) comprises slightly over 100,000 of the country's 150,000 teachers.

Other countries have unions with large membership. For example in Honduras, the Professional College for the Advancement of Teaching (*Colegio Profesional Superación Magisterial de Honduras* (COLPROSUMAH)) has 25,000 members, the Honduran First College of School Teachers (*Primer Colegio Profesional Hondureño de Maestros* (PRICHMA)) has 13,000, and the College of Secondary Teachers of Honduras (*Colegio de Profesores de Educación Media de Honduras*, COPEMH) has 13,317 members. In Uruguay, out of almost 18,000 teachers, 4,000 are members of the National Federation of Secondary School Teachers (*Federación Nacional de Profesores de Enseñanza Secundaria*, FENAPES), while the Association of Secondary Education Teachers (*Asociación de Docentes de Enseñanza Secundaria*, ADES), representing secondary-school teachers in Montevideo, has about 2,400 members. The teachers' organizations

of Costa Rica have between 13,000 and 23,000 members (Palamidessi, 2003; Ibarrola and Loyo, 1999).

### *Integration versus fragmentation*

The most recent enquiries (Grindle, 2004; Palamidessi, 2003; Ibarrola and Loyo, 1999) into the teachers' unions of Latin America reveal a wide variety of situations as regards the integration or fragmentation of such organizations within the countries. In some countries the teachers' unions are fairly divided depending on the education level with which they are concerned; for instance, the secondary-teachers' unions hardly ever act in concert with the primary-teachers' unions. This is true of Honduras, Nicaragua, Guatemala and El Salvador, where the various organizations have not integrated into one overarching professional association.

In other countries, despite their differences the unions have organized into nationwide confederations and networks. Such is the case in Argentina and Brazil. In Argentina, the CTERA groups together the provincial teachers' unions, with membership drawn essentially from the public sector. In Brazil, the National Confederation of Education Workers includes teachers' unions from both primary and secondary public schooling.

In general, the major teachers' organizations have to deal with as many entities as there are intermediate and local echelons responsible for educational management. This means that objectives can be contradictory and, more importantly, that opposing strategies are developed to reach those goals, which can harm the unions' public image and weaken their influence on the education system.

Finally, in some countries there is only one national union, with no divisions on the basis of geography or educational level. One such country is Chile, where the only union – the College of Teachers – represents all teachers regardless of their location and the educational level at which they work.

### *Relations with political parties*

Teachers' unions can also be classed along more conceptual lines, such as the relationship they have with the political parties in each country. Seen from this angle, there are also different models of teacher unionism.

In a few countries the unions are involved in the power structure of some political parties represented in government. As pointed out by Tiramonti, in countries like Costa Rica, Mexico, the Dominican Republic, Venezuela and El Salvador, "the creation of the trade unions was closely linked to the political parties and movements that, through them, built organizations making it possible to incorporate new sectors into their networks [...] These unions maintain the link with the rank and file because they draw primarily on the party structure" (Tiramonti, 2001: 9).

In another group of countries the unions have been able to distance themselves from the political parties. They have built sturdy union structures and command considerable political sway even though some are heavily protected by the State. Such is the case in Chile, Argentina and Colombia, where although the teachers' unions maintain ties with the different political parties, they act autonomously in negotiations with the different governments. According to Tiramonti, "In these countries, though there are links between teachers' unions and political parties, those parties do not determine union policy and have no hand in choosing union leaders. In these unions the strategies aim more at ensuring representation of the rank and file rather than conserving affiliations with political parties" (Tiramonti, 2001: 9).

Lastly, in some countries the unions are independent of the political parties, are not protected by the government and are very militant. Brazil and Guatemala are two cases in point. Here, the teachers' unions traditionally have made their case outside the party or government framework.

### *Main descriptive variables*

The study by Grindle (2004) deals with the main descriptive variables and indicates that the majority of the teachers' unions in the region consolidated throughout the first half of the twentieth century. The following table shows the results of an analysis of 11 countries; only Nicaragua – where teacher unionism began to firm up in the 1980s – stands out. In a number of countries there is only one major union organization in the education sector. At the other extremity is Venezuela, where fragmentation has bred at least seven major unions.

The centralist political tradition is also worthy of note. Of all the cases included in the table, only Brazil and Nicaragua have decentralized structures, whereas the others are either partly or completely centralized.

Another interesting point made by Grindle (2004) is the scenario of low and scattered confrontation in the 1990s in the countries under review, right in the middle of the education-reform process. Peru alone stands out as a country where there is 'high confrontation' with the government.

Conversely, Grindle's analysis highlights the heterogeneity of the relationships between teachers' unions and political parties. In countries such as Argentina, Bolivia and Peru, teachers' organizations appear to be closely identified with a political party, whereas in Colombia, Costa Rica, Mexico, Nicaragua, Ecuador and Venezuela, relations with political parties are looser. In Chile there is a teachers' union without any special affiliations to political parties.

Finally, in his classification, Grindle asserts that except for Chile, Costa Rica and Colombia, the educational transformations, along with negotiating and confrontation processes, have weakened the power of most teachers' union organizations. *Chapter IV* will examine how this determines the shape of dialogue and negotiation processes with government agents, limiting the institutional approaches that may lead to the building of consensus.

Table 2.1 Teachers' unions in Latin America in the 1990s

	Argentina	Bolivia	Brazil	Chile	Colombia	Costa Rica	Ecuador	Mexico	Nicaragua	Peru	Venezuela
Number of organizations	3	2	—	1	1	3	1	1	4	1	7
Number and percentage of workers represented	200,000/ 73%	92,000/ 100%	—	101,000/ 75%	300,000/ 65%	40,000/ 100%	170,000/ 90%	1,103,000/ 100%	30,000/ 70%	200,000/ 100%	200,000/ 65%
Decade of initial unionization in the sector	1900 1940	1930 1940	1930	1920	1950	1940	1930	1910 1940	1980	—	1930
Structure: high (H), medium (M) or low (L) centralization	M/L	H	L	M	M	H	H	H	L	H	M
Ministry relationship: high, medium or low confrontation	M	M	M	L	L	L	M	L	L	H	M
Party relationship: high, medium or low identity	H	H	—	L	M	M	H	M	M	H	M
1990 trajectory of power: ↑ ↓	↓	↓	↓	↑	↑	↑	↓	↓	↓	↓	↓

Source: Vaillant, 2005, from Grindle, 2004: 121.

## *Union motivations*

Analyses of the features of union structures in Latin America underline particularly the internal contradictions besetting them. The main strain felt by the teachers' unions of the region in recent years is probably connected to the contradiction between the traditional or corporatist trade union (more widespread) and the now more professional-type union.

Teachers' unions can be both vehicles of protest and places of deliberation about teaching; they may follow a militant union model or a more specifically professional model. Trade unions have many roots and frames of reference, that is, they have both ideological and practice-based components anchored in several – and often conflicting – universes. There is nothing to stop teachers – even if they are union members – being identified with the issue of professionalization, since the latter must be taken<sup>17</sup> as the process by which a job becomes a profession requiring specific, professional skills.

Ibarrola and Loyó emphasize that “the current emphasis within teacher organizations on the professional dimension of teaching tends to depart from certain traditional patterns [...] Nonetheless, this does not mean that teachers' unions are foregoing their confrontational role or are failing to mobilize in order to press their claims. In essence, the move towards professionalization in teachers' organizations should not be seen automatically as a shift towards a more conciliatory stance. To achieve any degree of success, a negotiation depends on a host of elements and not merely an about-turn in the approach taken by teachers' unions” (Ibarrola and Loyó, 1999: 9).

Loyó (2001) considers that this contradiction is proof that the teachers' unions in Latin America act for many differing reasons at once. He asserts that the unions' foremost motivation is their own management, generally seeking to broaden their sphere of intervention, especially with respect to the administrative side of education systems. Alternatively, they operate in the collective interest, attempting to negotiate the best possible working conditions for their members.

17. As pointed out in the introduction.



Moreover, they tend to follow a logic of cronyism “granting privileges in exchange for various types of support and characterized by glorifying loyalty rather than professional quality” (Loyo, 2001: 77). Additionally, unions often maintain their activity for the purpose of status enhancement, the main goal being to improve the low standing of the teaching profession.

It is also politically advantageous for the unions to boost their power by forging multiple links between union leaders and politicians. The politico-partisan logic would have it that unions' action should benefit the parties to which they are tied.

Finally, Loyo (2001) indicates a reason relating to identity and typified by a quest for greater recognition, not for the teaching profession but for the union, so that it reproduces values ascribed to teacher unionism in order to attract members.

**Table 2.2 Motivations of Latin American teachers' unions**

<b>Area of interest</b>	<b>Objectives</b>	<b>Examples of action</b>
<b>Union management</b>	Maintain all spheres of union management	Oppose attempts to streamline administration
<b>Corporative</b>	Improve the working conditions of union members	Defend uniform working conditions as a fundamental principle
<b>Cronyism</b>	Privileges in exchange for support	Emphasis on loyalty rather than quality of performance
<b>Status upgrade</b>	Restore the social standing of the teaching profession	Create refresher-course training alternatives
<b>Union policy</b>	Benefits for the union affiliates	Oppose any changes that may upset the balance of power in the union
<b>Partisan politics</b>	Advantages for the political-party members	Use union resources to the benefit of the political party

**Table 2.2 (continued)**

<b>Area of interest</b>	<b>Objectives</b>	<b>Examples of action</b>
<b>Identity</b>	Social recognition for the organization. Identification with its principles	Work for the furtherance of education. Participation in collective action. Altruistic behaviour

*Source:* Vaillant, 2005, from Loyo, 2001.

This diversity of motivations underlying teacher-union activism may be caused *inter alia* by a combination of union tradition – generally connected with political parties or government apparatus – plus an education culture that is still far from becoming professionalized. The divergent approaches are manifest in the legal nature and names gradually acquired by the different teachers' unions in Latin America.

As underscored by Ibarrola and Loyo (1999: 8):

“The very names of the organizations differ widely: unions, corporative associations, colleges of professionals, some prefer ‘*teacher*’ in their title and see themselves as representing the middle class, a number of them use derivatives of the term ‘*master*’, while a few others remain closer to a class concept with their reference to ‘*workers*’. Undoubtedly, this is an expression of the underlying tension between a worker identity and a professional identity that is a feature of this type of organization. If we disregard the name, the way in which this tension is worked out will determine the adequacy of the response offered by the organizations to the different types of problems facing them. Some issues are strictly work-related (working conditions, wages, benefits and the like), while others touch on education policy (financing of education, study programmes, decentralization, evaluation, etc.)”.

In summary, although the teachers' unions of Latin America do show some common features, the institutional configurations of the different countries contrast quite sharply. Such differences are in keeping with the degree of integration or fragmentation of union

structures, their relationships with other players in the political system and the educational level they involve. However, it should be stressed that teachers' unions are extremely complex organizations that call into play various action strategies and objectives that quite often can become antagonistic. They seek to improve members' working conditions and renovate the teaching profession, while at the same time they must be involved in the different areas of policy debate. They must also sustain their organizations and their influence while supporting exchange with the unions from other sectors and strike a balance with the federations of affiliated union groupings. These contradictions sometimes hamper opportunities for dialogue and negotiation and often halt the consultations on education reforms.



### III. Points of conflict

Disagreements of teachers' unions with the education reforms undertaken have studded the history of Latin American education. The reasons for this are many and have to do with certain education policies as well as with the general national, regional and even world context. However, the sticking points are related not only to the content of the reforms, but also to the way in which these are designed and implemented. Thus, education ministries have a positive perception of the measures adopted for the benefit of teachers – including salary increases and bonuses –, whereas teachers' associations do not see the changes in the same light.

#### *Types of protest*

A recent study by Gentili and Suárez (2004) analyzed the different types of teacher protests in the region from 1998 through 2003. It showed that the countries in which such protests were the lengthiest were Argentina (1,491 days), Brazil (1,118 days) and Mexico (978 days). They were followed by Bolivia, the Dominican Republic, Ecuador, Guatemala and Honduras, where industrial action amounted to over 100 days. Finally, Nicaragua and El Salvador had the fewest days of strikes (8 and 13 days respectively).

**Table 3.1 Teacher protest movements in 18 Latin American countries from 1998 through 2003<sup>18</sup>**

	Total per country	Total per country taking length into account	Total per country not considering length	Total days	Average days of protest
<b>Argentina</b>	146	104	42	1,491	14.3
<b>Bolivia</b>	51	26	25	192	7.3
<b>Brazil</b>	117	79	38	1,118	14.1
<b>Chile</b>	11	4	7	31	7.7
<b>Colombia</b>	31	20	11	85	4.2
<b>Costa Rica</b>	11	5	6	47	9.4
<b>Dominican Rep.</b>	51	33	18	113	3.4
<b>Ecuador</b>	22	13	9	186	14.3
<b>Guatemala</b>	30	12	22	147	12.2
<b>Honduras</b>	64	23	41	119	5.1
<b>Mexico</b>	150	47	103	978	20.8
<b>Nicaragua</b>	9	2	7	8	4
<b>Panama</b>	26	7	19	39	5.5
<b>Peru</b>	24	14	10	46	3.2
<b>Paraguay</b>	27	11	16	62	5.6
<b>El Salvador</b>	13	3	10	13	4.3
<b>Uruguay</b>	23	20	3	71	3.5
<b>Venezuela</b>	57	12	45	56	4.5
<b>Total/ Overall average</b>	863	435	432	4,802	11

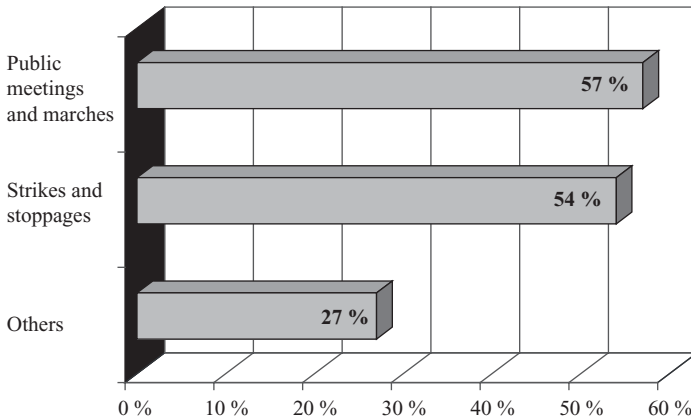
Source: Vaillant, 2005 from Gentili and Suárez, 2004: 13.

18. The figures given concern both nationwide conflicts and disputes that arose in provinces or states. The top ranking of Argentina, Brazil and Mexico is partly explained by the large variety of disputes that can occur in different states and at various government echelons in these three countries given their geographical size and decentralized structure. Any comparison therefore must bear this in mind and consider that the countries with the largest number of days lost to strikes are not necessarily those in which teacher protest is the most rife.

However, taking the average number of days per strike as an indicator of the extent of protest, Mexico ranks first (20.8 days), followed by Argentina and Ecuador (14.3 days) and Brazil (14.1 days). The shortest average lengths were registered in Guatemala (12.2 days), Costa Rica (9.4 days), Chile (7.7 days), Bolivia (7.3 days), Paraguay (5.6 days) and Panama (5.5 days). In all, the average length of industrial disputes for the whole region was 11 days.

Another interesting fact yielded by the analysis of teacher-union disputes in Latin America has to do with the types of mobilization chosen by the unions so as to set their grievances to rights. The study by Gentili and Suárez (2004) reveals that in 57 per cent of the disputes recorded, unions favoured public meetings and marches. Some 54 per cent of the protests involved strikes or other union mobilizations, while 27 per cent included other types of action.

**Figure 3.1** Types of protest used by teachers' unions

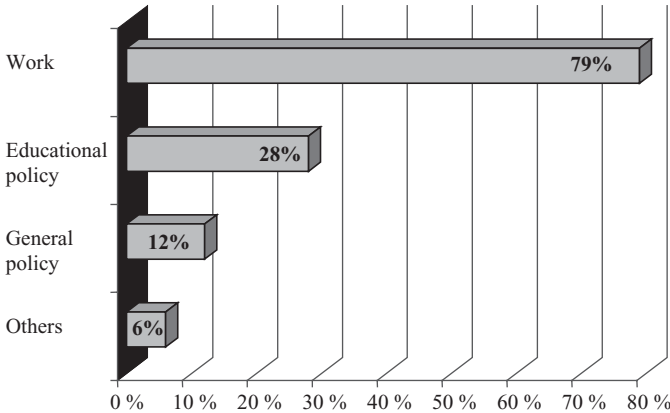


Source: Vaillant, 2005, from Gentili and Suárez, 2004: 16.

NB: As one industrial action can involve more than one type of protest the total can exceed 100 per cent.

The study by Gentili and Suárez also showed that during the period under review the purpose of nearly eight out of every ten conflicts (79 per cent) was to improve working and employment conditions. Union demands on education policy concerned almost three conflicts in ten (28 per cent), and those relating to matters of general policy 12 per cent.

**Figure 3.2 Teachers' grievances and demands by type**



Source: Vaillant, 2005, from Gentili and Suárez, 2004: 16.

NB: as one industrial action can involve more than one type of protest the total can exceed 100 per cent.

This spread highlights the preponderance of economic, financial and corporative concerns among union claims. It should also be stated that the different types of protest have to do with politics, itself bound up with the dynamics of teachers' unions, which then determines the scenarios and points of conflict between unions and government.

### *A long history of disagreement*

What does the term *conflict* mean? Most definitions state that conflicts are based on perceptions. These are such that one group



may think that another has wronged it or is capable of harming its interests. Thus, a divergence of interests is perceivable that leads to the belief that the needs of one group cannot be met while satisfying those of the other.

The following table shows that the main union claims focus on low wages and issues involving teachers' pay, allowances and various other benefits.

**Table 3.2 Main conflicts between governments and teachers' unions**

<b>Country</b>	<b>Main conflicts</b>
<b>Argentina</b>	Wages – Working conditions – Law on the status of teachers
<b>Brazil</b>	Primary-teachers' career development – Wages – Bonuses for full-time teachers
<b>Chile</b>	Wages – Working conditions – Lengthening of the school year – Class sizes – Teachers' evaluation and training
<b>Colombia</b>	Teachers' pension fund – Defence of public education – Outsourcing – Defence of teachers' rights
<b>Costa Rica</b>	Wages – Municipalization of education – Pension funds – Lengthening of the school year – Working conditions
<b>El Salvador</b>	Wages – Teacher training
<b>Honduras</b>	Wages – Working conditions – School administration by the community – Decentralization
<b>Mexico</b>	Wages – Working conditions – Pensions – In-service teacher training
<b>Nicaragua</b>	Teachers' stability of employment – Wages – Non-regulation of the law on teaching careers
<b>Peru</b>	Free education under threat – Teachers' stability of employment – Wages – Privatizations
<b>Uruguay</b>	Authoritarian nature of the reform – Wages – New curricula in middle school
<b>Venezuela</b>	Wages – Pensions

*Source:* Vaillant, 2005, from Palamidessi, 2003.

Argentina stands out: there, the modification of the law on the status of teachers is one of the most significant transformations accomplished. Along with claims for higher wages, this was one of the main contentions of the CTERA, Argentina's largest union of teachers.

In 1990 in Costa Rica, wage claims also generated a major strike. In the ensuing years, this was followed by other mobilizations to prevent the approval of changes to the pension legislation. The same is true of Nicaragua, where several strikes have been held over recent years to avert the application of proposals that would weaken the stability of the teaching profession, to demand the timely payment of wages and to get the law on the teaching career passed.

Other major issues have prompted serious confrontations between governments and unions; for instance, opposition to the different decentralization processes and to moves towards the privatization of education services – which lately have been the subject of a good number of reforms. In some countries, such as Colombia and Peru, these themes have elicited much resistance from teachers' organizations.

Much of the resistance has grown from the lack of consultation perceived by the unions on the presentation and application of government reforms. Palamidessi underscores this: “after the shaping of a new organizational model proposed by the reforms – and in which the teachers' unions have no specifically defined place – union demands relate strongly to the right to participate in the decision-making process” (Palamidessi, 2003: 19).

The unions have also displayed some resistance to changes concerning the various benefits afforded to teachers. Tiramonti contends that this opposition is due to the questioning (resulting from outside pressure) of benefits obtained previously through union mediation. “The confrontations brought on by government proposals to alter the law on the status of teachers and their pension schemes could be put in this category” (Tiramonti, 2001: 18).

The unions also opposed evaluation systems, as they were deemed to be a means of administrative control (Palamidessi, 2003: 18). On this point, Tiramonti signals that “national evaluation systems can be seen as means of control for use by agents and institutions that, through union mediation, may lead to a system of sticks and carrots thereby building differences that demolish the homogeneity of its social foundation” (Tiramonti, 2001: 17).

In some countries the unions have accused reforms of being too heavily influenced by the ideology of international financial organizations such as the Interamerican Development Bank (IDB) or the World Bank. Finally, other conflicts are related to demands concerning teacher professionalization. This is true of El Salvador for example, where union pressure secured the approval of the law on the teaching career.

### *Map of union grievances*

Union-government relationships are often hostile. In fact, as underlined by Palamidessi (2003: 19), either the unions act in unison, mobilizing their members together, or they go on the defensive. It can happen that the relationship between government and union is mutually supportive; that said, the relation can also be quarrelsome, hostile or submissive.

According to Palamidessi (2003), in education reforms the demands and main grievances on which unions base their action can be put into three groups: economic-corporative, political-ideological and political-corporative.

Economic-corporative conflicts are closely related to the effects of reforms on working conditions and the future role of teachers. The unions clash with governments on wages and the changes made to the standards governing the duties of teachers. Clashes also arise over national evaluation systems of teachers' performance. Here, resistance is at least in part due to attitudes dictated by power struggles.

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In the political-ideological area, we find the refusal by unions to countenance decentralization, privatization, and any relinquishment of responsibilities. There are 'routine' ideological arguments, but the reforms have given rise to a more decentralized system that obliges the union movement to redistribute power even within its own organizations.

Political-corporative confrontation occurs in situations where unions wish to maintain a collective area of influence over the choice and content of public policy. It manifests itself as a very clear union protest at any lack of consultation during the elaboration of most of the reforms enacted in Latin America.

Put briefly, in Latin America opposition and conflicts between teachers' unions and governments during the reform processes of the 1980s and 1990s concentrated essentially on three aspects: wages, working conditions and the professionalization of teaching; transformations in the organization and management of the education system; and the way in which reforms were prepared and implemented, including the lack of arrangements to ensure dialogue and negotiation with teachers' organizations. Furthermore, there is little systematic and concerted development of arrangements for dialogue in the region, to establish areas of agreement and promote long-term accords.

## IV. Distinctive cases

During the 1990s and into the first years of the twenty-first century, the governments and teachers' unions of most Latin American countries went through a period of clashes over education reform. What lessons can the unions and governments draw for the implementation of such reforms? Which conditions are needed for the design and application of education policy to enlist teacher-union participation in the reform process, thus fostering educational quality? To try and answer these questions, below is an analysis of a few experiences in which there was genuine dialogue: namely Chile, Mexico, the Brazilian state of Minas Gerais, Guatemala, Honduras, El Salvador and the Dominican Republic.

**Table 4.1 Some positive experiences of dialogue between unions and governments**

<b>Country</b>	<b>Dialogue process</b>
<b>Chile</b>	Three-sided mechanism including the Ministry of Education, the Chilean municipalities association and the College of Teachers.
<b>Mexico</b>	Two- or three-sided mechanism: SNTE with the public education ministry (and in some instances with the participation of the President's office). Bilateral mechanisms also operate at state level.
<b>Minas Gerais (Brazil)</b>	Individual negotiations and positive outcomes on wage claims and in reaching at least minimum consensus on reform plans.
<b>El Salvador</b>	Dialogue processes based on the establishment of various levels of consultation and the sharing of information at given points in time.
<b>Guatemala</b>	Consultation commissions with the participation of public and private institutions.
<b>Honduras</b>	Negotiations by different organizations with the Ministry of Education and participation of the President's office.

**Table 4.1 (continued)**

<b>Country</b>	<b>Dialogue process</b>
<b>Dominican Republic</b>	Participation by the largest union on the national education board, after enactment of legislation in 1997.

Source: Vaillant, 2005.

### *Chile: Agreements on evaluation*

Following many years of conflicts and negotiations, the Ministry of Education and the College of Teachers were able to talk to each other in good faith. Initially, evaluation was seen as a way of placing teachers under control and surveillance and was rejected by the unions; later, however, they studied and researched the subject through national and international investigations. This helped facilitate dialogue and the elaboration of increasingly technical projects.

Dialogue between the Ministry of Education and the College of Teachers enabled solutions to be found to a whole set of issues (*Table 4.2*).

**Table 4.2 Characteristics of the dialogue between the government and the unions in Chile**

In 1991, acceptance of the legislation on the status of teachers, based on a bill presented by the Ministry of Education, with the backing of the teachers' union.	National dialogue on educational modernization in a national commission made up of representatives from government, political parties, teachers' organizations and other civil-society bodies.	The College of Teachers proposes a modification to the constitutional law on education and the development of incentive and wage-increase systems.	Unions and government sign accords ensuring the necessary funding for the introduction of various educational programmes including those aimed at lengthening the school day.	A protocol is signed between the College of Teachers and the President's office establishing the formal mechanisms of a system for the ongoing participation of the unions in the different implementation stages of the education policy.
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Source: Vaillant, 2005.

It should be pointed out that the consultation process launched in Chile successfully established agreements in areas where usually it is difficult to reach understanding. This was true of the evaluation system and the law on the status of teachers. Adopted in 1991, it focuses more particularly on the professionalization of teaching but does stop short of meeting wage claims – one of the main grievances of the College of Teachers.

A second law on the status of teachers passed in 1995 introduced technical criteria and greater flexibility in the management of schools. Finally, a third law on teacher status was enacted in 2001. It instituted a plan to raise salaries over the period from 2001 through 2003. This statute laid down new norms pegging career development to individual evaluations of teaching expertise. The evaluations were designed by the national system for the evaluation of teaching performance (*Sistema Nacional de Evaluación del Desempeño Docente*, SNED); it also provided for the creation of incentives for educational excellence and a network enabling teacher trainers to exchange knowledge (PREAL, 2004).

In Chile, the agreements signed by unions and government include not only issues relating directly to the teaching career and profession, but also measures designed to improve education and consolidate the profession: the extension of the school year to 38 weeks in full-time schools, the reduction of class size (from 45 to 40) in schools operating in disadvantaged socio-economic contexts, and the constitutional law on education authorizing the participation of union representatives on the Higher Board of Education (Picazo, 2003).

Recent analyses of Chile's experience in consultation agree on the conditions that assured successful dialogue between the unions and the government (OECD, 2004): (a) a growing economy, conducive to significant improvements in social policy; and (b) a deep-rooted tradition of dialogue and debate on teachers' working conditions and pay. Another factor that helped ensure harmony was that there was a single teachers' union – the College of Teachers. The union emerged as a key player and the technical expertise it displayed made it an important partner in matters of education policy. According to Núñez Prieto, the existence in Chile of an education authority

“characterized by political continuity and the ability to formulate government policy, institutional discipline and a technical, political capability to design and implement wide-ranging education reforms” (Núñez Prieto, 2001: 9) undoubtedly played a part also.

However, to be a real success Chile's consultation process must continue: some groups of authors hold that despite active and growing teacher participation over the years, there are still many areas where their involvement is still no more than formal. This idea has been expressed by the College of Teachers in the following terms: “Efforts to establish consensus in different areas, including education, have brought together players of widely differing authority and power in a society that is not yet entirely democratized; that is, since the opportunities and conditions for genuine participation are not equal, the voice of the strongest always carries the day” (Assael and Pavez, 2001: 5).

To sum up, despite the difficulties encountered, the consultation process was developed while attending to and pursuing values that assured continuity and democratic management, decentralization and financial discipline (Núñez Prieto, 2001).

### *Mexico: Palpable distinctive features*

Mexico is an interesting case in point despite its distinct peculiarities (Loyo, 1999: 3) that have to do with the SNTE. The union has over one million members and is the largest and most powerful teachers' union of the region.

The SNTE is highly politicized and has always had close relations with the Institutional Revolutionary Party (*Partido Revolucionario Institucional*, PRI) and its apparatus. It is the seat of ongoing conflicts between its different political factions and the national executive committee (CEN). Among the opposing groups, separated from the SNTE, is the National Confederation of Education Workers (CNTE), which has become the largest rival organization. It grew from the merger of regional teachers' movements and includes educators who dispute the 'institutional' position of the SNTE and struggle for greater recognition in the union (Loyo, 1999).



Despite its complexities, the case of Mexico is of interest because of the framework agreement signed in 1992, under which the federal government, the state governments and the SNTE undertook to institute a new round of reforms centred on decentralization, improved efficiency, quality, and relevance of outcomes. The nature of the accord is twofold: it is a pact, but it is also a project, the three main thrusts of which are presented in *Table 4.3*.

**Table 4.3 The national agreement in Mexico (1992)**

Main Actions			
National agreement for the modernization of primary schooling.	Reorganization of the education system to factor in federalization; foster social participation in the education process and the SNTE as the only partner empowered to regulate working relationships in the field of education.	Curriculum reform, based on plans covering the different disciplines; creation of a programme to teach the history of the nation; introduction of public competitive tendering for the development of textbooks.	Strengthening of teaching through five strategies: primary-teacher career supported by training, minimum wage, national initial-training system, further-training possibilities, introduction of programmes designed to attract young people to teaching.

*Source:* Vaillant, 2005.

In Mexico, assessments of the consultation process on the application of the new education policies show that one of the keys to success is commitment by the SNTE to abide by the agreement. The predominance of the SNTE in the negotiations is explained by its corporative structure, consolidated by the government of Mexico as of the 1940s; this enabled successive governments to deal with a single partner, which simplified negotiations (Maceira and Murillo, 2001).

The Mexican political system has long functioned on the single-party model. The stranglehold maintained by the Institutional Revolutionary Party – in power from 1929 until the end of the 1990s

– was backed by a powerful bureaucratic machine. Concentration of power, political loyalties, absence of participation and one-party politics are features of Mexican history that greatly influenced the processes of negotiation and dialogue with the unions. Furthermore, the specific characteristics of the SNTE and the strategies employed by the government played a crucial role in the success of the negotiations. Not only did the government acknowledge the SNTE as a legitimate counterpart for the implementation of the education-decentralization process, but also it encouraged improvements to teachers' salaries and the creation of the teaching career.

### *The state of Minas Gerais: Decentralization reform agenda*

In the Brazilian state of Minas Gerais, the reforms adopted to curb the decline in educational quality came into effect in 1991. In April of the same year, the reform team invited teachers to attend a public debate and the education secretariat presented to them the main thrusts of the reforms. These included greater school-based decision-making power on administrative, financial, management and pedagogical matters. The roles of head teachers were strengthened: henceforth, the citizens of the communities to which their schools belonged would elect them. This procedure introduced major changes to head-teacher selection: previously, their appointment was left to local politicians.

The education secretariat proposed the creation of a system of community input to decision-making, especially for the day-to-day running of schools. Something akin to the school boards of other countries' public schools (e.g. the USA) had to be set up, on which parents, pupils and teachers would be represented.

Regarding negotiations with teachers' organizations, recent studies have unveiled some specificities in the process of dialogue (Grindle, 2004) in Minas Gerais (*Table 4.4*).

**Table 4.4 The dialogue process in Minas Gerais (1991)**

Players	Characteristics		
<b>Governor</b>	The State Governor	Reform processes	The reforms plan amply
<b>Minister</b>	strongly supported	strongly endorsed by	satisfied one of the
<b>Technicians</b>	the Education	research of accredited	main demands of the
<b>Unions</b>	Secretary and the	specialists, working in	teachers' unions:
<b>Teachers</b>	different aspects of	commissions set up to	greater school
	the reforms plan.	examine the different	autonomy, not only in
	This support was	aspects of the	the use of resources
	decisive in the	proposed changes.	but also in schools'
	approval of the	With the Education	pedagogical orientation
	Education Reform	Secretary of Minas	and the organization of
	Act against a	Gerais, these experts	non-academic aspects.
	backdrop of strong	became the foremost	
	union opposition.	negotiating partners of	
		the unions.	

Source: Vaillant, 2005.

In Minas Gerais, the negotiating context was characterized by a substantial splintering of the unions and by differences between them on the main aspects of the reform. In the 1980s, the largest teachers' union – the Union of Education Workers (*Único dos Trabalhadores em Educação*, UTE) – articulated various demands: a minimum wage for primary and secondary teachers, greater autonomy for educational establishments, and the introduction of evaluations so that teachers could be integrated into a profession and thereby secure steady employment.

Just as the reform was in full swing, the UTE tried to make itself the only body representing teachers. However, other players stepped up and joined the negotiating process. One was the Minas Gerais Association of Public Teachers (*Associação de Professores Públicos de Minas Gerais*, APPMG) that described itself as a non-union, non-political organization representing the interests of a large proportion of teachers. Another was the Minas Gerais Association of Public-School Head Teachers (*Associação de Diretores das Escolas Oficiais de Minas Gerais*, ADEOMG), which also claimed the right to take part in the negotiations.

The three organizations adopted fairly different positions. While the UTE was partly against the education reform process, the Minas Gerais Association of Public Teachers decided to back the reform initiatives unequivocally. The Minas Gerais Association of Public-School Head Teachers firmly opposed one aspect of the reform put forward by the government: namely, the involvement of the community in the choice of head teachers and having them sit for a written test to assess their technical abilities and management skills<sup>19</sup>.

This type of dialogue is rather different from that of other countries such as Chile or Mexico. In Minas Gerais, the negotiation succeeded largely because the unions were disunited (as already examined) and especially because the opposition of the most powerful union – the UTE – had been neutralized by concessions on wage increases. Additionally, the Minas Gerais Association of Public-School Head Teachers strongly supported the whole reform package, especially the changes relating to school-based management.

Another important mechanism came into play in the dialogue process: namely, the government's strategy to involve most of the other stakeholders. This brought in organizations that approved of the proposed reforms; they did not carry much political weight but they did play an important role in discussions with the other organizations and the Ministry of Education (Grindle, 2004: 149).

The successful implementation of the education reform in Minas Gerais was also the result of political support that made it possible for the state government to agree to the wage increases demanded by the strongest union. Another factor was the disunity of the opposition that also benefited the reformers, giving them more leeway; this kept the most radical stances in check and paved the way for at least minimum consensus on most of the changes proposed.

19. The test yielded a shortlist of the three best-placed applicants; these were then to present their work plan for the school concerned. The candidate making the best proposal would be appointed head of the school for three years, during which time the school board would assess his/her leadership and management capabilities.

### *El Salvador: The importance of technical advisers*

In 1993, El Salvador commenced discussions between the government and various parts of the population. The dialogue was aimed at finding a consensus on the main aspects of the education reform. Researchers were appointed; firstly to explore the education system, then to make evaluations and do research. In 1995 this group of technical advisers became a standing committee with the main duty of publicizing the findings of the first diagnosis and organizing dialogue with leading politicians, international agencies, teachers, parents' associations, pupils, students and education-ministry officials (Gajardo, 1999).

The discussions lead to a reform plan concentrating more particularly on coverage, ineffectiveness of the education system and the drop in quality. Through dialogue, the largest teachers' unions were brought on board<sup>20</sup> and agreed to the main tenets of the reform.

Later, the National Forum for Education reform was created; its purpose was to develop a consensus on the overall diagnosis of the education system and the proposed plan of action. The Ministry of Education co-ordinated the Forum, which involved many social players including: the Salvadoran Union of Primary-School Teachers (*Sindicato Gremial de Maestros de El Salvador*, SIMES), the National Association of Salvadoran Educators (*Asociación Nacional de Educadores Salvadoreños*, ANDES), and various universities and private research centres. In this instance, the consultations were designed to be used in an opinion poll on the different aspects of decentralization, the promotion of school autonomy, increased school coverage, and improvements to teacher training.

Consultations were held and proposals made on the essential issues of teachers' working conditions, salaries, and the inadequacy of public teachers' union rights; however, they did not yield many

20. However, in El Salvador the unions have to contend with many constraints. In fact, Salvadoran legislation limits the right of teachers from the public sector to join a union.

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concrete results. Hence, some teachers' unions became sceptical of discussions held within the Forum, seen as a mere formality that did not enable genuine, effective participation by unions in the decision-making process.

*Guatemala: The consequences of peace agreements*

The Guatemalan peace accords of 1996 were conducive to dialogue between the government and the different sectors of society, teachers' unions included. Union participation was harnessed through the creation of working committees designed to define the education policies of the new reform. Among the main groups created were the Standing Commission on Education Reform, the Joint Commission for the Reform of Education and the Consultation Commission of the Education Reform.

The Consultation Commission of the Education Reform was able to achieve a modicum of consensus on the crucial aspects of the reform: an overhaul of course contents, teacher training, bilingual education, relationships between the various cultures and regionalization.

Teachers' organizations played a vital role in securing this consensus. Right throughout the process their impact was obvious, more particularly from 1997 with the creation of the National Assembly of Primary Teachers (*Asamblea Nacional del Magisterio*, ANM). The Assembly took an active part in the discussions on the reform bill. In 1999 it also helped bring changes to course contents and the vocational training of teachers.

*Honduras: Short-, medium- and long-term objectives*

In Honduras, the National Convergence Forum (*Foro Nacional de Convergencia*, FONAC) was created in 1994; its aim was to become an area for dialogue and consultation between the government and the different players of civil society. Its main goal was to facilitate exchanges between its members in order to reach agreement on the education-reform project.

The Forum was backed by COLPROSUMAH [Professional College for the Advancement of Teaching in Honduras], the country's largest union. Many players were consulted, including the municipal and departmental representatives of the government and civil society. Specialists from the different education levels were called upon to provide input, the diverse viewpoints of the various agencies were gathered, and all the media with nationwide reach were consulted.

Consultations took about 14 months; 16,000 people from 300 different organizations collaborated in the operation that concluded with the drafting of a plan. This was put to a debate that lasted a further three months. Once the process was completed, the President of Honduras presented the final document to an assembly of representatives of all the players consulted and of international aid agencies.

The document examines the short-, medium- and long-term objectives and, among the themes examined, advocates institutional change along with an overhaul of the organization of the education system to improve coverage, educational quality and equity. It also recommends reorganizing the National Education Board so that it includes representatives of both the civil society and the Federation of Teachers' Organizations. Furthermore, it proposes a new teacher training system, the creation of a network for educational research, and the launching of a programme to improve school infrastructure.

It took much shuttling back and forth to get agreement on the draft education reform, but assessments show clear acceptance of the process and its outcomes by government officials and COLPROSUMAH.

### *The Dominican Republic: A definition of a ten-year plan*

To correct the serious problems of educational coverage and quality in the education system of the Dominican Republic, a ten-year education plan (PDE) was framed with the collaboration of all sectors of society. Here too there was an interesting consultation, planning and consensus process. The plan developed in 1990 was aimed at instituting a reform of the education system to make education

the pillar of Dominican development by the year 2000. The Dominican Association of Teachers (ADP) took an active part in the consultation process and in working out the PDE. It signed up to what was termed a 'pledge to the nation and the future of Dominican education' with the government. The objectives of the plan are outlined in *Table 4.5*.

The changes proposed in the PDE are set out in four interlinked programmes: the emergency programme, the consolidation programme, the support programme and the provincial programmes.

The PDE has had a major repercussion on the development of Dominican education. Its contribution to the sparking of a broad debate within society is virtually beyond question. However, since 2000 the ADP has called for a "return to the spirit of the policies now being disavowed by those who had supported the ten-year education plan" (Fulcar, 1999: 14-15).

In 2000, the unions, along with the various sectors of government and Dominican society, saw that the PDE was somewhat at a standstill. Yet there had been much progress: the General Education Act, providing for the inclusion of the ADP in the regional bureaux of the Ministry of Education, was passed in 1997 and the National Education Board became the main authority on education policy. Perhaps the law was passed too late; and maybe the PDE had not provided the operational machinery needed for its proper follow-up.

At first, there was strong and broad social mobilization behind the plan: this gave rise to great expectations, not only in the Dominican Republic but throughout the whole region. Nonetheless, recent studies agree that the recognition of the ADP as a relevant decision-making partner did not always go hand in hand with meaningful consultation on union claims and government initiatives. In the case of the Dominican Republic, this only prompted teachers' organizations to reassume their opposition to the government, which weakened the mechanisms for dialogue already established<sup>21</sup>.

21. See Fulcar, 1999; Ibarrola and Loyo, 1999.



**Table 4.5** Agreements established under the ten-year plan in the Dominican Republic (1990)

Objectives of the ten-year plan	
Strategy	
Consultation, planning and consensus process	Increase financial resources from government and society to education by broadening the sources of funding
Broaden basic-education coverage; facilitate access and permanence in the education system of children and youth from disadvantaged zones	Obtain the genuine and organized participation of society, local communities and parents in the management of the education process
Dialogue between government/Dominican Association of Teachers	Raise the competence and efficiency of the Ministry of Education and its provincial and municipal offices
	Significant improvement in social, economic and working conditions of teachers
	Curriculum reform to make education more relevant

Source: Vaillant, 2005.

In summary, there have been mechanisms for dialogue and consultation in the region. Furthermore, for the better planning of education reforms, insights can be drawn from the examples of existing negotiated education policies. In Chile, the reform of teachers' working conditions grew out of negotiations on wage increases, improvements in conditions of employment, mechanisms to regulate exchanges between teachers and employers, and the development of formal instruments to evaluate teaching expertise.

Despite its singularities, Mexico is an example that shows how having just one union to deal with can simplify negotiations on the link between teachers' pay and their teaching competence. In Mexico, the negotiations served to put together a career approach that seeks to consolidate teacher professionalization, retain teachers in the schools, and improve the living standards of those teachers operating in difficult circumstances.

The consultation process in Minas Gerais shows that in some cases, organizing a reform requires strong government negotiating skills; indeed, to reach a modicum of consensus on its draft reforms, the Brazilian Government readily made concessions on wage claims.

In El Salvador, the importance of dialogue based on a series of consultations and the dissemination of information at set junctures is worthy of note. This model, which arose from the participation fostered by the Ministry of Education, appears to be more suitable than traditional models as it generates greater group involvement in the reform process. Lastly, the other cases studied (Guatemala, Honduras and the Dominican Republic) show that government-union dialogue is possible through pre-established mechanisms and spaces designed to foster basic consensus on education-reform plans.

## V. Avenues for action

Here the role of teachers' unions in the context of the education reforms applied in the 1980s and 1990s in Latin America is described and analyzed. As seen throughout this report, dialogue and negotiation processes between governments and unions depend on a large number of variables. Clearly, the cultural, institutional, political and historical traditions of each country are fundamental; and, obviously, teachers' organizations are very complex institutions, often working towards different ends.

The teachers' unions have different motivations, which causes contradictions and can often hamper dialogue and any worthwhile dealings with government. That said, generally speaking a will to talk – on the part of unions and of government – is not enough: the democratic tradition is weak, cronyism runs deep, and the technical capabilities of education administrators are limited.

Which circumstances have characterized the negotiations between government and unions in Latin America? Which variables have enabled accords to be struck between union organizations and government authorities? These were some of the questions asked at the start of this study and that spurred some of the following thoughts.

### *The effects of education reforms*

*Inter alia*, the education reforms have increased coverage, improved educational quality to some extent, and transformed course content. In several cases, strategies to professionalize teaching have also been introduced: bonuses and non-monetary incentives for teachers, further education, and regulation of teachers' working conditions.

However, most of the reform processes did not bring to the forefront any long-term policies to increase wages. Quite often it was

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left to teachers to drive forward and implement education reforms with no rewards in wages or any other sort of significant compensation. This left its mark on the mood of the negotiations and exchanges between governments and union organizations.

Moreover, the reforms often decentralized the management of education systems, which – at all levels – resulted in a waning of union power and necessitated new negotiating scenarios.

*Diversity of political and cultural traditions*

The possibility of a dialogue between the unions and the education authorities depends largely on the political and cultural context, but above all on the institutional history of each country. *Chapter II* demonstrated that the variety of teachers' unions in the region is enormous and that the strength of democratic traditions varies widely.

The political, social and cultural scene of each country appears to be a determining factor in the emergence of spaces for consultation and dialogue between unions and governments. For example, in Guatemala and El Salvador the return to democracy after a lengthy period of authoritarian rule and the conclusion of peace accords seems to have fostered channels for dialogue between the government and the different social actors, teachers' unions included.

*Disparity in negotiations*

The heterogeneity of the union organizations is also reflected in their ability to become valid negotiators with government players. *Chapter IV* affirmed that this ability is linked to the way in which the unions themselves are organized and whether they are divided or united.

Most case studies indicate that the chances of successful dialogue are high when only a few unions take part. Conversely, the more divided the union camp is, the weaker their ability to negotiate with government. Nonetheless, there are exceptions, and caution is advised when drawing conclusions: in Minas Gerais, dialogue succeeded

primarily because the unions were divided. In this particular case, the splits in the ranks of the opposition favoured the reformers by giving them more leeway.

Account must also be taken of the rivalries between the various power groups within the teachers' unions. When negotiations are going on, unions' infighting lessens their ability to build a united front against government authorities.

Currently, the situation of the teachers' unions is complicated. As already seen, there is considerable segmentation, which means that no one solution can be applied across the board. Generic norms need to be worked out to enable limited negotiations to take place, with some flexibility. In addition, although the situation may not be the same in all countries, throughout the region unions' discourse and promises appear to have 'run out of steam', which has widened the gap between them and their members.

### *The importance of technical capabilities*

Unions' technical expertise and their ability to interact on government decisions concerning the diagnosis and formulation of education policy form another important variable in negotiations. In a country like Chile, the College of Teachers developed its technical skills so that it became a pre-eminent negotiator on matters of education policy. In many other countries, however, the picture is very different. The unions do not always have specialized professionals in their ranks able to discuss and propose long-term education policies. This puts them at a 'technical disadvantage' compared to the education administration.

*Chapter IV* showed that when union organizations tend to the professional skills of teachers, then their main claims are likely to be of a more technical nature, which simplifies dialogue with the education authorities.

The technical capabilities of union organizations appear to be linked, *inter alia*, to the policies governing the training of their

members. In countries such as Chile, Colombia and Argentina, the unions have included teacher development and further education in their basic functions. They have taken the initiative of training their officials and members; and this appears to have positive effects on their ability to intervene in the educational policy-making process. On this point, however, the teachers' unions are in a difficult position: if they turn away from the more traditional models of negotiation among social partners, they run the risk of becoming too heavily involved in the examination and determination of education policy to defend the interests of their members.

### *Ideological tendency*

As seen in the previous chapters, the ability of the teachers' unions to become valid negotiators up against the government depends as much on their ideological profile as their relations with other actors of the political system.

In some countries, the unions react to reforms in accordance with the stances taken by the party or parties with which they are aligned. This greatly influences the establishment of channels and arrangements for dialogue and negotiation. Case studies of successful negotiations between education authorities and unions show that there is no recipe or clear-cut prescription to determine which is the best 'ideological scenario' for dialogue.

Our investigations threw up fairly different types of relationships between unions and political parties. While Mexico's SNTE is solidly embedded in the power structure of the Institutional Revolutionary Party<sup>22</sup>, the unions in Chile have forged out a space independent of the political parties and government protection. Be that as it may, it is clear that the identification of the unions with some of the political parties does condition their attitude to reforms. These allegiances also restrict the scope for governments to take action as well as their readiness to create spaces for negotiation and consultation.

22. that has governed the country for a good part of its history

### *The predominance of the public sector*

The second chapter of this review mentioned that teachers' unions in Latin America mainly include primary and secondary teachers from the public sector. Not only is the government the biggest employer of union members; it also has the power to set the rules of the game, lay down teachers' working conditions, and launch and encourage the different educational changes.

From the second half of the twentieth century, almost right throughout Latin America the unions signed up large numbers of teachers from the public sector. The unions often agreed with government intervention in defence of the public character of schooling. Mostly, the term 'education' refers to government-run schools. However, the government is not just another employer; sometimes it imposes provisos and/or sacrifices asked of no other profession less concentrated on the public service (Perrenoud, 1991).

### *Sources of inspiration*

Latin America's experiences of consultation and dialogue over education reforms are varied. Despite marked differences in their history and characteristics, Chile and Mexico have made significant headway towards the negotiation of common goals between teachers' unions and government. The two countries did, however, have one feature in common: a single, strong teachers' union that set itself as the main negotiator dealing with the education authorities.

Other countries have also progressed towards greater consultation and proposed interesting lines of action in contexts marked by very real differences. Thus, in Minas Gerais, the state government bowed to certain wage claims, thereby enabling some consensus so that the unions would agree to the proposed reforms.

El Salvador, Guatemala and Honduras opted for various 'waves' of consultations with the unions, the goal being to gauge their thinking on the shaping of education policy. Lastly, in the Dominican Republic an action plan was framed. It called for the participation of the main

teachers' union on the National Education Board that developed and administered that country's reform process.

### *Starting points for dialogue*

The institutional configurations, both of the teachers' unions and the education authorities, constitute the starting point for dialogue in the region. *Chapter IV* analyzed the different experiences in negotiation and consultation that resulted in various agreement models.

An analysis of these cases shows the growing importance of union organizations in the success or failure of the reforms; their political clout and their ability to foil government strategies are obvious. Union participation is becoming indispensable, not merely to avoid resistance to government-proposed transformations, but also to ally them to the decision-making processes and take advantage of their views in the preparation of diagnoses, action strategies and evaluation methods.

It should also be stressed that consultation processes between teachers' unions and education authorities are more likely to succeed if teachers' working conditions are enhanced through giving pay rises, granting various benefits, and strategies to update teachers' knowledge and training.

The information gathered shows that consideration must be given to the fact that each country has not only its own particular political and cultural traditions, but also well-defined participation practices. In some cases the government makes decisions on public-policy matters but the participation of other players is both frequent and appreciated. In other countries a strong tradition of 'big government' and the weakness of other sectors of society have left the unions out of the decision-making process. When new institutional frameworks based on consultation and dialogue are being established, due thought must be given to these variables and participatory models constructed that – over and above their formal components – rely on the traditional structures and practices peculiar to each country.



### *Involvement of union players*

Various authors (*inter alia*, Nuñez Prieto, 1999) emphasize that autonomy, a critical bent, and social responsibility on the part of teachers' organizations may facilitate their positive participation in public policy. Without those qualities their contribution fetters, or even halts, reform processes.

With greater self-determination unions could better attend to the specific interests of their members; moreover, they would be in a position to contribute more to efforts aimed at improving educational quality. We have seen that most Latin American teachers' unions are answerable to the government. They should become more autonomous, not only with regard to the government but also to the church and political parties.

A questioning approach is another must if unions are truly to participate in the framing of effective and democratic public policy. This requires greater technical capabilities of the unions – or at least of their leaders – so that they can step back and examine problems and strategies objectively, as well as freely and clearly express their views and proposals.

Lastly, teachers' organizations must shoulder their share of social responsibility for education. The involvement of the unions in the establishment of public policy is beneficial when accompanied by a responsible attitude towards members' interests, but also towards the broader interests of society at large.

Autonomy, an ability to challenge and social responsibility are therefore the necessary conditions for the unions to be engaged more in the introduction of new education policies and the improvement of educational quality. They could then become *bona fide* partners in the process of negotiations with government, thereby improving their image and winning public support.

### *The role of education officials*

The implementation of education reforms requires changes also on the part of education ministries and decision-makers. The latter need to have a more strategic vision, use a more suitable style of language, and report on reforms better.

First, education officials should have certain leadership skills. The history of education reforms has shown that, at least at the outset, they require a leader and teams that are heavily committed to realizing the transformation. It is a complex undertaking to monitor and steer a reform managed by school administrations that do not always have the requisite knowledge and skills. In fact, it is not a matter of management, but rather of mobilizing participants and giving meaning to the change. The evolution of the education system and the 'permanency' of reforms make education officials managers of change, a role for which they are very unequally prepared.

However, ministry officials should also use the right language and have the proper communication skills. Government officials should advocate the change, explain why it is inescapable and convince opponents, all while making sure not to discredit the people with whom they are dealing – including the unions.

These days, the media play an important role in reporting the innovations and changes to be introduced. To most education ministries, working with the media is a real challenge for which they are hardly prepared. Education officials must learn to explain reforms clearly and directly to the various groups in society, among which the unions.

Furthermore, ministry officials should master negotiating skills and develop better negotiation strategies. If education officials were to encourage active union participation in the identification of problems and then in the formulation of education policy, and if wage increases were granted under certain conditions, reform implementation would be greatly facilitated. Wage negotiations also would be smoother.

## *Conclusion*

Quite often, the unions interpret education reforms from an ideological standpoint; as do education officials. In Latin America, reforms usually are introduced in a context of dispute, and practically all change is challenged. Participation and consultation are not a miraculous antidote to such wrangling. Refusal to participate is frequent and is part of a strategy: the principle is to disagree. Consultations are not designed to create from the start ground for dialogue and co-operation that would enable shared representations to be developed, the decision-making processes to be speeded up and reforms to be implemented. Many education reforms fail simply because from the outset they do not provide opportunities for exchange or elements allowing for negotiation and compromise. Rather than endeavouring to win the fight, education authorities and union officials alike should join in putting together an analysis of the problems and the solutions. As Perrenoud asserts: "This does not rule out disagreement and conflict. However, those disputes will have been worked through conceptually, thereby making it difficult to 'go back to square one'. The union should commence ongoing consultation, with a strong technical component [...] The split should occur between those who have worked on an issue and those who have not, more than between opposing positions in wage relationships. Participation or 'joint management' would not necessarily change, but the orientation of union action would be thoroughly transformed" (Perrenoud, 1991: 31-33).

Whichever the context, Perrenoud's statement is thought-provoking. Education is too important to be steered by simplistic confrontations.



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The Institute's aim is to contribute to the development of education throughout the world, by expanding both knowledge and the supply of competent professionals in the field of educational planning. In this endeavour the Institute co-operates with interested training and research organizations in Member States. The Governing Board of the IIEP, which approves the Institute's programme and budget, consists of a maximum of eight elected members and four members designated by the United Nations Organization and certain of its specialized agencies and institutes.

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