

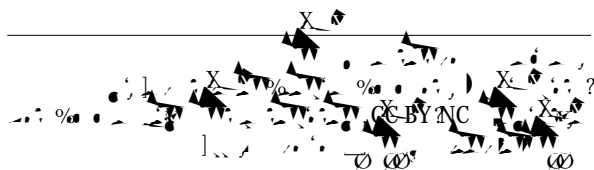
The Quest for Educational Equity in Mexico

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I examine the dynamics of implementing at-scale reforms to provide meaningful educational opportunities to disadvantaged students in Mexico. To effectively reduce social inequality and exclusion, education policies need a mix of system-wide and targeted efforts that are implemented at scale and sustained long enough to become institutionalized. The resiliency of those policies requires an elusive balance between system-wide and targeted efforts, alignment between federal and state initiatives, and supportive politics. However, the politics of implementing system-wide reforms are more contentious than those involving targeted efforts because they disrupt entrenched interests, making such efforts harder to sustain. Targeted policies, while easier to implement, reinforce the segregation of students into different educational tracks of varying quality.

The Mexican public education system has, since it was created a century ago, advanced policies that challenge high levels of inequality and poverty. Such efforts became more salient as Mexico joined the North American Free Trade Agreement (NAFTA) in 1994 and after the democratic transition that took place in 2000. These forces shaped policies with inclusive intent over remarkably long periods, even as some administrations made modifications to these policy initiatives and claimed them as their own. While considerable financial resources were devoted to these policies, implementation was deficient because of the challenges of simultaneously meeting three essential conditions: 1) complementarity and coherence between system-wide and targeted programs, 2) alignment between federal and state priorities and sufficient levels of capacity across states and localities to support the demands of those policies, and 3) supportive politics. The results of these equity-oriented policies fell short of the aspirations of the reformers, and they were insufficient to transform the structure of economic and social opportunity in Mexico.

The economic transformation resulting from the greater integration of Mexi-



al development had stagnated in Mexico because of the debt crisis of the 1980s and the consequent economic adjustment and contraction in education spending. As Mexico joined NAFTA, President Salinas de Gortari and then President Ernesto Zedillo made education a higher priority in the national agenda.¹ Their educa-

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ated the first schools for Indigenous children in rural areas. Building on this work,

(operated by CONAFE). Twenty-one thousand Indigenous schools enroll eight hundred thousand students, out of an estimated 1.2 million Indigenous students, who also attend general schools. Indigenous groups in Mexico speak sixty-eight different languages, some of which are used for instruction in Indigenous schools. In those schools, there is no dual bilingual education (in which students would learn all subjects in both languages). At best, Indigenous languages are taught as a subject for three hours a week; but because many of the teachers assigned to those schools are unable to speak Indigenous languages, they typically don't even do that. The poor training of teachers in Indigenous schools and nonexistent coordinated bilingual education contribute to the low educational outcomes of those schools. A large percentage of Indigenous students attends either regular rural schools or urban schools, which offer no language support. One of the shortcomings of these various subsystems of the Mexican education system has been the lack of flexibility to adjust to demographic flows, such as the large migration of Indigenous communities to urban areas.

Basic education is a shared responsibility of the thirty-two states and the federal government, and there are significant variations across states and local governments in resources and capacity to fund and support educational initiatives. The federal government, which had full responsibility for schools until a constitutional reform decentralized education services in 1992, supports states through a series of programs that transfer resources and set national education policy on issues such as curriculum, teacher appointment processes, and mandatory textbooks. Since state secretaries of education are appointed by state governors and the federal secretary of education is appointed by the president, there is greater alignment between state and federal policy when there is party affinity across the federal and state governments.

Who is marginalized in Mexico? Social and economic exclusion in Mexico is shaped by various intersecting dimensions of identity, among which social class is salient. Ethnicity and location of residence also play a role in social exclusion, and those living in small communities in rural areas in certain states—mostly in the south—are the most marginalized. Indigenous populations and those who are displaced in search of economic opportunity are also marginalized. Intersectionality across various dimensions aggravates marginalization: for instance, Indigenous groups who are poor and live in rural areas in the poorest states are more marginalized, and among them, women are marginalized further.

While the incidence of poverty has declined over the years, it has done so slowly over the last decade, only to increase post outbreak of COVID-19. In 2016, 43.2 percent of the population was considered poor; this figure declined to 41.9 per

siderably by state, from over 60 percent in the southern states of Chiapas (75.5 percent), Guerrero (66.4 percent), and Oaxaca (61.7 percent), to under 30 percent in the central and northern states of Jalisco (31.4 percent), Nuevo Leon (24.3 percent), Coahuila (25.6 percent), Chihuahua (25.3 percent), Baja California (22.5 percent), and Baja California Sur (27.6 percent). Among OECD countries, Mexico has the third-highest level of income inequality, and while it declined during the 1990s until the mid-2000s, it has since stagnated.⁶

Nine out of ten Indigenous people, who represent 12 percent of the population, live in higher or very high marginalization, and eight out of ten live in poverty.⁷ While 79 percent of the population lives in cities with more than one million people, 21 percent lives in remote and small communities of less than 2,500; the geographic dispersion of this population makes it more difficult to implement effective programs.⁸

Educational reform was spearheaded by the integration of Mexico into NAFTA during the presidency of Carlos Salinas de Gortari (1988–1994). President Salinas launched a program that modernized basic education, reformed the curriculum, and established a new generation of school textbooks. The creation of technological and polytechnical universities complemented these system-wide reforms by offering preparation in technical fields linked with the economic needs of the various regions of Mexico. These universities, which still exist, have been aligned to the export-oriented industries most directly impacted by NAFTA. The administration of President Enrique Peña Nieto (2012–2018) introduced dual programs of study that provided flexible pathways to continue higher education studies. Over 80 percent of the students served by these institutions are first-generation college students. Other targeted programs begun during the Salinas administration included compensatory programs to support education in the poorest southern states.

President Ernesto Zedillo (1994–2000), who had been secretary of education during the Salinas administration, continued these efforts, further emphasizing civic education and a review of the history curriculum. His administration enhanced efforts to evaluate the quality of education, joining the OECD Programme for International Student Assessment (PISA), which evaluates students' knowledge and skills. In 1997, Mexico launched PROGRESA, a program that provided economic incentives (cash transfers) to families, conditional on enrolling their children in school and following up with health checkups; the program lasted for nearly two decades until it was terminated in December 2018. The Zedillo administration also began a program to expand the duration of the school day. Much of the expansion in enrollments in the preceding decades had relied on using the same school building for multiple shifts of students, which shortened the duration of students' school day to about four hours of instruction. The program of

full-day schools sought to increase learning time to about eight hours of instruction; it continued in the three subsequent presidential administrations, and its reach increased tenfold to more than twenty-five thousand schools during the Peña Nieto administration. An impact evaluation of the program found that it had significantly improved student learning while also reducing grade repetition and dropout rates, particularly for low-income students and for those in schools serving high percentages of low-income students.⁹ The program of full-day schools was discontinued, however, during the administration of President Andres Manuel Lopez Obrador.

The election of President Vicente Fox (2000–2006) in July of 2000 marked the first political transition of power to a party other than the PRI. President Fox maintained the priority of advancing transparency and accountability in education and created an autonomous institute for educational evaluation, the National Institute for the Evaluation of Education. This institute coordinated several evaluations of student knowledge and skills, including participation in PISA, and mandated that the reports of such studies be publicly available. The emphasis during Fox's administration was on system-wide improvement of the quality of education and expansion of access (including allocation of funding through school-based management programs and the implementation of large-scale technology in education initiatives), along with the continuation of two targeted programs, the PROGRESA cash-transfer and

education for all as a constitutional right, setting equity as a national priority, and led to system-wide initiatives as well as several targeted programs to support educational opportunities for marginalized students.¹⁰ Equity was identified as a core element of quality education in the general education law.¹¹

The range of Peña Nieto's system-wide reforms included the redesign of the curriculum to foster twenty-first-century skills, values, and socioemotional development. It also prioritized the improvement of learning environments, defin-

especially in terms of access to education and creation of schools, while highlighting the elusiveness of the constitutional mandate of ensuring an excellent education with equity for all. In particular, the report concludes that the education system reproduces inequalities in tracking the most disadvantaged groups— Indigenous and migrant students, students learning at community centers, and students learning via tele-education— in separate education streams.¹⁴

The administration of President Lopez Obrador (2018–2024) discontinued some education reforms initiated by his predecessor, dismantling the process of teacher appointments and promotions based on assessments of knowledge and skills, and transforming the National Institute for the Evaluation of Education into a government agency without constitutional autonomy. The administration also diminished the emphasis on system-wide policies of inclusion in favor of targeted programs without a clear target population. Lopez Obrador’s administration launched seventeen “priority programs” to foster social inclusion, most of which were to be implemented by the Ministries of Agriculture and Rural Development, Education, and Welfare. An analysis of the seventeen programs by the National Council for the Evaluation of Social Policy concluded that only six of them clearly identified the results they sought to achieve and the target populations these programs were meant to serve.¹⁵ Three programs to be implemented by the Ministry of Education were the creation of one hundred new “Universities for Well-Being,” the Benito Juarez Universal Scholarship for Students of Upper-Secondary Education, and Youth Writing Their Future. The goal of the Universities for Well-Being is to create one hundred institutions of higher education in communities where upper-secondary education is offered but there are no institutions of higher education nearby. The Benito Juarez scholarship program for students of upper-secondary education awards 875 pesos per month (approximately USD 51) to students enrolled in this level. Youth Writing Their Future is another scholarship program for students aged eighteen to twenty-nine, enabling them to continue their studies in higher education or technical training, consisting of 2,575 pesos per month (approximately USD 150).¹⁶

The various policies to support educational inclusion implemented over the past three-plus decades have produced several achievements— notably, the expansion in access to education and the extension of compulsory education— that have elevated the levels of educational attainment of the popula-

of kids are enrolled in secondary education, and between ages sixteen and seventeen, 61 percent are enrolled in an upper-secondary school.²⁰

Even though these policies expand access, equity disparities remain, particularly in access to upper-secondary education. In 2019, 64 percent of the Indigenous

related to student performance in the assessment, the gap between the most advantaged and least advantaged students is comparable to the gap for all countries in the OECD, and the gap has decreased in Mexico over the last two decades.²⁶ Student achievement levels dropped significantly during the COVID-19 pandem-

6) preexisting socioeconomic inequalities amplified the impact of the pandemic on learning opportunities.³¹

The low effectiveness of remote-education modalities used during the protracted period of suspension of in-person instruction caused many children to disengage from school and some to drop out. At the preschool level (ages three to five), net enrollment rates dropped from 71.4 percent in 2019–2020 to 63.3 percent in 2021–2022, at the primary level they dropped from 98.3 percent to 96.3 percent, at the lower-secondary level they increased from 83.8 percent to 83.9 percent, and at the upper-secondary level they dropped from 63.2 percent to 60.7 percent.³² Students experienced significant learning loss, which was greater among marginalized students, though the loss experienced was, on average, consistent with that of other OECD countries.³³

Despite more than three decades of equity-oriented policies, equal educational opportunity for all remains elusive in Mexico. Much progress has been achieved in expanding access to education and in increasing the number of years of schooling of the population, but levels of student knowledge and skills remain low relative to other countries in the OECD and relative to the intended goals of the Mexican curriculum. Important gaps also remain in access to upper-secondary education, in student knowledge and skills, among marginalized students and their more privileged counterparts, and between public and private schools. But these gaps are not exclusively the result of what educational institutions do. Poverty and inequality shape opportunities to learn through multiple channels, including the support students have at home and the conditions in which they live.

The policies to support inclusion have been of two types. The first are those that seek system-level transformation to expand inclusion: for instance, declaring a quality and equitable education a constitutional right, making three years of preschool and of upper-secondary education compulsory and free, and efforts to improve the quality of education. The second type of efforts include targeted policies, such as conditional cash transfer programs, programs of Indigenous education, and community-based programs. Both types of policy have demonstrated great resiliency over time, suggesting that educational inclusion and equity have become an important priority across party lines. Mexico's increasing reliance on the use of evidence to analyze public policies supports the continuity and continuous improvement of such policies. The creation of the National Council for the Evaluation of Social Policy has provided steady support in the form of analysis and data to inform policymaking. But despite the resiliency of the equity-oriented efforts, there have been occasional setbacks, such as the elimination of the autonomy of the National Institute for the Evaluation of Education and the elimination of knowledge and skill assessments from teacher career tracks.

The more resilient policies include system-wide approaches, such as high levels of spending in education, extension of compulsory education, creating and distributing new textbooks, augmenting the ambitions of the curriculum, and efforts to assess student knowledge. Though there have also been disruptions to the autonomy of the agency in charge of student and teacher performance assessments.

tion. Considerable variation in states' levels of institutional capacity and resources shape how policy is implemented across Mexico. In addition, when state and national offices are controlled by different political parties, there are fewer incentives to work together to implement education policies.

The implementation challenges to equity-oriented education policies in Mexico reflect forces that have been identified elsewhere. A study of the politics of education reform found that access-oriented policies benefit from more political support because they distribute gains to many groups and costs to few, whereas quality-oriented policies enjoy less political support because they impose costs on key groups.³⁵ A study of education reforms in the United States concluded that most of them have failed to reach scale, except for the expansion of schooling and the incorporation of extracurricular subjects in high school, which did not require deep changes in practice and worked within existing organization and culture. Other exceptions were “niche reforms” that were able to change the “grammar of schooling” for smaller subsystems or networks of schools, rather than the en-

endnotes

¹ It is debatable whether the integration of Mexico in NAFTA alone created sufficient incentives to improve education quality, since much of the economic development strategy involved the creation of industry based on lower wages, relative to other partners in the economic zone. However, during the same period, the Economic Commission for Latin America proposed an agenda for economic and social development in Latin America that would rely more on high value-added industries based on knowledge. These policy ideas influenced the education and social development strategies of countries in Latin America. Economic Commission for Latin America and the Caribbean and UNESCO Regional Office for Latin America and the Caribbean *Education and Knowledge: Basic Pillars of Changing Production Patterns with Social Equity* (United Nations, 1992).

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¹⁴CONEVAL, *Evaluación integral de los programas federales vinculados al derecho a la educación*.

¹⁵CONEVAL, *Análisis de los programas prioritarios al primer año de la administración 2018–2024* [Analysis of priority programs during the first year of the 2018–2024 presidential administration] (CONEVAL, 2020), https://www.coneval.org.mx/InformesPublicaciones/Documents/Analisis_Programas_Prioritarios.pdf

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