

The Politics of Competencies

**a policy trajectory study of the re-contextualisation of
the 2009-2011 competency-based curricular reform of
Mexican primary education**

Rosanne Elisabeth Tromp

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Abstract

In this thesis I study the politics of the re-contextualisation of the Mexican 2009-2011 competency-based curricular reform to primary education, aiming to understand the processes of “complex contestation, resistances and refractions at play between policy text production and practice” (Rizvi & Lingard, 2010, p. 84). Increasingly, education policy ideas such as competency-based education emanate from the global field. It is less clear how and why these are re-contextualised in local conditions, and ultimately connected to either trends towards homogenisation or heterogenisation of education practices. I argue that the re-contextualisation of education policy needs to be studied at countries’ (sub)national scales to understand how curricular approaches that draw on global discourses and imaginaries are re-contextualised differently.

Drawing on the post-structuralist work of Ball (cf. 1994, 2012), Buenfil-Burgos (cf. 2000) and Rizvi & Lingard (cf. 2010), I apply a policy trajectory study to trace the processes of interpretation and enactment of the idea of competencies by different actors both ‘vertically’ (at international, national, state and school scales) and ‘horizontally’ (in the states of Michoacan and Durango). This allows for an understanding of the curricular reform as being given meaning and enacted within multiple and contested discourses that are informed by different social imaginaries, as it was struggled over at different scales and in different contexts. The analysis focused on the idea of competencies as a floating signifier and suggests that its meaning was fixed, first, within different competency discourses to produce heterogeneous curricular texts. Second, key interpreters, such as teachers’ unions, played a significant role by representing the meaning of competencies differently at different scales and contexts. And, third, meanings of competencies changed through its enactment within the different material and political contexts of teachers’ classrooms. The research suggests that these processes produced heterogeneous competency practices.

I contribute to the study of the re-contextualisation of education policies that draw on global education imaginaries by expanding the methodological tools of a policy trajectory study and applying it in Latin America. The findings have implications for understanding the politics of the re-contextualisation of education policies as an active struggle to define the meaning of floating signifiers by key interpreters, and by allowing a better understanding of the role of political and material contexts in producing unique meanings, practices and outcomes at the (sub)national scales.

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Acronyms

ACE	<i>Alianza por la Calidad de la Educación</i> Alliance for Education Quality
ANMEB	<i>Acuerdo Nacional para la Modernización de la Educación Básica</i> National Agreement for the Modernisation of Basic Education
ATP	<i>Asesor Técnico Pedagógico</i> Pedagogical Technical Advisor
CEAS	<i>Coordinación Estatal de Asesoría y Seguimiento</i> State Coordination of Advice and Follow-up
CNTE	<i>Coordinadora Nacional de Trabajadores de la Educación</i> National Coordination of Education Workers
COCOPO	<i>Consejo Coordinador Obrero Popular</i> Popular Worker Coordination Council
DeSeCo	Definition and Selection of Competencies
ENLACE	<i>Examen Nacional del Logro Académico en Centros Escolares</i> National Exam of Academic Achievement in Schools
ExEb	<i>Fundación Empresarios por la Educación Básica</i> Mexican Foundation of Businessmen for Basic Education
GEP	"Global education policy"
IADB	Inter-American Development Bank
ICT	Information and communications technology

IISUE	<i>Instituto de Investigaciones sobre la Universidad y la Educación</i> Institute of Research about the University and Education
IMF	International Monetary Fund
INEE	<i>Instituto Nacional para la Evaluación de la Educación</i> National Institute for Educational Evaluation
L2	Second language
L3	Third language
MoE	Ministry of Education
NVQ	National Vocational Qualifications
OECD	Organisation for Economic Cooperation and Development
OEI	<i>Organización de Estados Iberoamericanos para la Educación</i> Organisation of Ibero-American States
PAN	<i>Partido Acción Nacional</i> National Action Party
PISA	Programme for International Student Assessment
PRI	<i>Partido Revolucionario Institucional</i> Institutional Revolutionary Party
RETE	Red Estatal para la Transformación Educativa State Network for Educational Transformation
SNTE	<i>Sindicato Nacional de Trabajadores de la Educación</i> National Union of Education Workers

UNAM	<i>Universidad Nacional Autónoma de México</i> National Autonomous University of Mexico
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UPN	<i>Universidad Pedagógica Nacional</i> National Pedagogical University
VET	Vocational education and training
WB	World Bank

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Chapter 1 Introduction

Competency-based education is surging in popularity and schools around the world scramble to implement their own versions of competency-based curricula (Griffith & Lim, 2014). Competency-based education is an example of what Verger et al. (2012b, p. 81) call “global education policy” (GEP). Competency-based curricular approaches focus on what learners can do with their knowledge as well as what they know. Often competencies are described as a combination of knowledge, skills and attitudes or values, and the focus is on observable outcomes which can be measured (Bowden, 2004). Competency-based education has its roots in behaviourist traditions popularised in the United States during the 1950s. Over the years, competency education has been appropriated by different actors for different purposes, drawing on different educational and political discourses. Recently, competency-based approaches to education moved again to centre stage as some governments and international organisations perceive it to produce the human capital, in the form of the knowledge, skills and attitudes of students entering the workforce, to enhance national positioning in the global knowledge economy (Vidovich & Sheng, 2007, p. 2).

Competency-based approaches to education are one of the curricular models that are most promoted in the 21st century. From the Netherlands to Indonesia to Tanzania curricula are being reformed on the basis of competencies. Speaking about Mexico, Díaz Barriga Casales argues that “in practically the entire world, and particularly in our context, there is a euphoria to establish competency-based curricula” (2009, p. 1). However, while on the one hand, a global converging of competency discourses in education can be witnessed, research also points to the impact of local contexts in producing asymmetrical education practices and patterns (Steiner-Khamsi, 2004, 2006; Verger et al., 2012b). In this thesis, I aim to answer the call for “rich empirical evidence on the interplay between processes of globalisation and the re-contextualisation of education policy in local places” (Verger et al., 2012b, p. 4).

During the 2007-2012 administration, the Mexican Ministry of Education set as one of its fundamental objectives “to raise the quality of education so that students improve their level of educational achievement, have a means of

accessing a better well-being and thus, contribute to national development” (SEP, 2007, p. 11). The main strategy for attaining this objective was the renovation of the curriculum of primary education on the basis of competencies. At the same time, Mexican education researchers and teachers’ unions contested the potential of competency approaches to increase the quality of education. These actors argued that competency-based education was imposed by international financial institutions and irrelevant for the Mexican context (Hernández Navarro, 2009; Navarro Gallegos, 2009, 2011; Ornelas, 2008a).

Combining ethnographic methods and policy document research into a policy trajectory study, I examine the politics of the re-contextualisation of the Mexican competency-based curricular reform to primary education, as it was adopted, transformed, enacted and contested at international, national, state and school scales and within the contexts of different states (Michoacan and Durango) in Mexico. This culturally, socially, and economically highly diverse upper-middle income country has embraced a neoliberal development model based on liberalisation, privatisation and deregulation since the 1980s (Pastor & Wise, 1997). Today, Mexico’s economy is one of the most open in the world. It is one of the top 15 by nominal GDP and the fourth-largest in the Americas after the US, Canada, and Brazil (IMF, 2014). Mexico is the fourteenth biggest world economy, it is also one of the two most unequal countries within the Organisation for Economic Cooperation and Development (OECD), together with Chile. More than fifty-three million people live in multidimensional poverty, and while the richest man in the world is from Mexico, more than twenty-three million Mexicans do not earn enough to acquire a basic food basket (Esquivel Hernandez, 2015). In education, Mexico has achieved near full access to basic education (Federal/SEP, 2012), but the quality of education as measured on standardised tests is low (PISA, 2006).

I contribute to original knowledge in several ways. First, I argue that the policy idea of competency-based education can be understood and functions as a floating signifier in Mexico. Competencies acquired various meanings because their empty and floating character opened the possibility of use within different

discourses and imaginaries that reflected different political and ethical projects. This meant that competencies took and were expressed in different competency approaches to education. Competency-based education was adopted by some Mexican education actors such as the national and Durango MoE and some teachers because the policy idea was able to (and made to) accommodate different agendas, and because it carried the imagined promise of integration into the global knowledge economy. Because it carried this promise, it was rejected by other Mexican education actors, such as the dissident teachers' union CNTE,¹ intellectuals and groups of teachers. Second, I describe the minutiae of the ways in which different key interpreters, such as the national MoE or teachers' unions, played dominant roles in the interpretation and enactment of the Mexican competency-based curricular reform at different scales of the policy trajectory. Third, I discuss how political and material conditions shaped the interpretations and enactments of the competency-based curricular reform differently *between* and *within* different scales and contexts. And fourth, I show that there is a need to account for different forms of contestation in order to understand the ways in which the Mexican competency-based curricular reform was contested along its policy trajectory.

I describe how my interest in the research emerged and evolved, as well as the gap in Mexican global education policy research in Section 1.1. Then, in Section 1.2, I discuss the main conceptual ideas. In Section 1.3, I present the questions that framed this research, followed by a description of the Mexican political context to education in Section 1.4. Finally, I present the overall structure of this thesis in Section 1.5.

¹ *Coordinadora Nacional de Trabajadores de la Educación.*

1.1 Background and rationale of the study: Improving Mexican education, but on the basis of whose quality?

1.1.1 Origins of the study

Two initial motivations formed the origins of this study. The first motivation is related to my concern with neoliberal education reforms and interest in alternative forms of education. My original idea was to study the resistance of the dissident teachers' union CNTE to recent Mexican neo-liberal reforms. I had acquired some knowledge about the union in 2006, when I conducted research for my MA thesis. My specific interest in competency-based curricular reforms was first sparked in 2007, when I developed a BA course on education and development at a Mexican university, in the state of Michoacan. I explored the link between competency-based education and (the idea of) quality education from an academic point of view, and learned that despite its popularity with governments and international organisations, there is little evidence of links between teacher behaviour and student performance, nor student competencies and economic growth (Burke, 1989).

I then went on to conduct small studies for the Ministry of Education of the Mexican state of Michoacan about the desirability and feasibility of competency-based education for secondary education, as the left-of-centre state government was critical of the approach. In this context, I talked to teachers in circumstances for whom the development of Information and Communications Technology (ICT) skills, which the reformed curricular required, was practically impossible. In my informal discussions with education actors about the approach, I also encountered what seemed like a plethora of 'local' interpretations, as well as discourses of resistance against the approach. I started to wonder which groups benefitted from promoting competency-based approaches in education.

Later on, I participated in a study for the Quality Educators for All project set up by Education International and Oxfam Novib about the desirability and feasibility of teachers' competency profiles in eight different countries. I learned that different groups of policy actors interpreted the approach differently, and

that some groups rejected the approach. One such group for example was the teachers' union CNTE² in Brazil. They argued that competency policy was not a Brazilian concept, but came from the World Bank, and aimed to promote neoliberal education reforms in Latin America (Bourgonje & Tromp, 2011, p. 69).

Observing competency-based education through the lenses of these different actors made me aware of the existence of different interpretations of competency policy, as well as its highly political nature. When, in 2009, the curriculum of Mexican primary education was reformed on the basis of competencies, this was presented by the national Ministry of Education as a means,

[t]o raise the quality of education so that students improve their level of educational achievement, have a means of accessing better well-being and, as such, contribute to the national development (SEP, 2007, p. 11).

The rhetoric surrounding the curricular reform presented it as a way of increasing the quality of Mexican education. At the same time, a number of Mexican states declared they would reject it, opposing among other things its perceived neoliberal nature, as well as contesting its relevance for Mexican contexts. Although the curricular reform was presented as being the answer to improving Mexican education quality, as well as being a participatory and contextually relevant reform, I wanted to 'open up' these assumptions by asking questions such as: *Why was competency-based education adopted as the approach to quality? Who participated? What were the counter-narratives against this version of quality and why were they excluded, and ultimately, whose interests were served?*

² *Confederação Nacional dos Trabalhadores em Educação.*

1.1.2 The theoretical and methodological gaps in the study of the re-contextualisation of global education policy in Mexico

My motivation for this research project also has a theoretical and methodological element. As I started to familiarise myself with the Mexican education policy literature, I found that although the study of Mexican education policy is an exciting and rapidly growing field, the politics of the re-contextualisation of education policies that draw on global education discourses, such as competency-based education, has been relatively underexplored.

Mexico has an important tradition of classroom research on the basis of ethnographical approaches, which have drawn attention to the school as an important site of “articulation of multiples and complex cultural and social processes” (Anderson-Levitt, 2011, pp. 73-74). However, Díaz Barriga and Inclán Espinosa (2001) argue there are not enough studies that focus on the day-to-day enactment of (global) education reforms by teachers. In other words, the role of teachers in education policy is underexposed and research fails to grasp “the complex contestation, resistances and refractions at play between policy text production and practice” (Rizvi & Lingard, 2010, p. 84).

In addition, not enough studies explore in detail the role of international education discourses, actors and institutions in Mexican education policy. However, as many authors have pointed out recently, the post-Westphalian reshaping of the state requires an examination not only of the shifting character of the activities of the nation-state, but also of the ways in which global imaginaries have become more relevant in both education policy content and policy production processes (cf. Rizvi & Lingard, 2010). This remains unexplored terrain, as studies either focus on the influence of international organisations such as the World Bank and OECD on Mexican education policy documents (cf. Maldonado, 2000), or on the resistance to these. Mexican scholars have greatly contributed to the policy education field by pointing out the dominance of neoliberal interests in Mexican education policy making, and by documenting

the motives for resistance to national education policy of the dissident teachers' union CNTE (see Coll Lebedeff, 2009; Hernández Navarro, 2009; Navarro Gallegos, 2011; Street, 2003). What remains underexposed are the actual intents, motivations, interests and policy practices of teachers *within* the CNTE.

As the curriculums of all levels of Mexican education are now competency-based, and education actors are grappling to make sense of the policy, education policy researchers are increasingly researching competency-based education (cf. Díaz-Barriga, 2011). Several of these studies review the theory and methodology of competency-based approaches. However, the relevance of approaches often remains unquestioned in these studies (Frade, 2009; Tobón & Guzmán, 2010; Tobón Tobón, 2010). These authors do not question whether this approach might be applicable in Mexico, who adopts it, and for what reasons. In other studies of competency based education in Mexico, micro-approaches dominate (cf. Andrade Cázares & Hernández Gallardo, 2010). In these studies, the difficulties of teachers in one or more schools to implement competency-based curricular reforms are recorded, but this is not placed within political or structural contexts. Arnaut and Giorguli (2010, p. 38) suggest that competency policies sparked by wider modernizing reforms in the 1990s represent a "milestone of change and transformation". However, I wanted to understand the nature of the watershed: *what changed, and do the transformations suggest homogenisation of education practices or rather growing inequality?*

The curriculum has been the centre of attention of many Mexican education researchers, and it has been ascribed an important role in the governance of education. For example, Arnaut and Giorguli argue that the Mexican basic education curriculum has been the bridge between the politics of the state and its grand ideological orientations, and education, and that moreover, the curriculum "reflects the view of the world, the political projects, and the reading of the social and cultural reality of the country in the different moments of its historical development" (2010, p. 36). However, what is under-researched, is how Mexican curricular reforms have also involved important processes of

conflict and negotiations between various political actors depending on the context, related to the nature of education (Miranda in Arnaut & Giorguli, 2010, pp. 48-49). The question should therefore be: *whose views of the world does the curriculum reflect?*

The field of global education policies (GEP) is in its infancy in Mexican education policy studies. Verger (2012b, pp. 3-4) argues that in general, research into global education policies (GEP) does not provide sufficiently rich empirical evidence on the interplay between processes of globalisation and the re-contextualisation of education policy in local places. For an understanding of education policies globally, the study of the complex relationships between global ideas, their dissemination and re-contextualisation in contexts such as Mexico is therefore a key task. Moreover, in the literature on policy formation within critical education policy studies an examination of how the social and ideological conditions for the development of a national policy, and confrontation with the realities of actual schools, relate, mediate, transform or even reject a policy are still sparse (Apple, 2008).

1.2 Main conceptual perspectives: space for interpretations and enactments within contextual and discursive limitations

As it moves, it morphs
(Cowen, 2009, p. 315).

In this section, I discuss the different conceptual tools that helped frame the arguments in this thesis. These are the main concepts of curricular policy as text and discourse, imaginaries, floating signifiers, and enactment.

My thesis is located within global education policies studies (Verger et al., 2012b). As Verger et al. argue, "today similar education reforms and a common set of education policy jargon are being applied in many parts of the world, in locations that are incredibly diverse both culturally and in terms of economic development" (2012b, p. 3). Education policy and programmes such as

competency-based education, have acquired the status of “global education policies” (Verger et al., 2012b, p. 3). Global education policies studies have focussed on the re-contextualisation of education policy in local places and ask why local policy makers and practitioners adopt GEP, what are the mediating elements and which institutions affect the re-contextualisation of GEP to particular education contexts (Verger et al., 2012b, p. 11). Within the field of GEP, I place my study within the critical education policy orientation (Simons et al. 2009).

1.2.1 Curricular policy as text and discourse

In order to understand the politics of the re-contextualisation of the competency-based curricular reform to Mexican primary education, I have conceptualised education policy as text after Ball (1994). Conceptualising policy as text makes it possible to think of it as “representations which are encoded in complex ways via struggles, compromises and authoritative public interpretations and reinterpretations and decoded in complex ways via actors’ interpretations and meanings” (Ball, 1994, p. 16). Policy texts are the result of compromise and struggle. They are the outcomes of different influences and agendas, but not in a pluralistic way, as “only some influences and agendas are recognised as legitimate, and only some voices are considered legitimate” (Ball, 1994, p. 16). As a result, meaning within texts might not be closed, or coherent, and sometimes the dissensus will result in the blurring of meanings within one policy document.

I take an explicit political view of the curriculum, that is, I understand the curriculum to be the outcome of the struggle between hegemonic groups to define relevant knowledge, values and opinions, but not in a democratic way. The construction of the curriculum implies a struggle between various interests and power games between groups such as national and international organisations and curriculum developers. The contents and methods, such as competency-based approaches, reflected in the curriculum are part of an

education project which in itself is part of a broader political and economic project. The Mexican curriculum has reflected the worldview, political and ideological projects and reading of the social and cultural reality of the country at various times in its historical development (Arnaut & Giorguli, 2010, p. 36). This is why the curriculum is so polemic, as from each political position a different orientation might be taken (Quezada Ortega, 2001, pp. 103-104).

Policy texts are in turn decoded. Although policy makers make efforts, they cannot control its meaning completely, because in the reading of policy texts, there is room for creativity and interpretation (Ball, 1994). Following Barthes, Gale (1999, p. 394) argues that policy readers have 'writerly' authority, which means that policy readers, such as teachers' unions or teachers, have room for manoeuvre, that is, space to adjust or re-write the original policy meanings that are encoded in text. Although texts do have an interpretational and representational history, that is, policy writers have certain intentions and meanings, these do not automatically follow from the text, because they do not enter into a social vacuum. Action may be constrained differently, but it is not determined by policy and solutions to problems posed by policy texts will be localised (Ball, 1994, pp. 18-19). Rizvi and Lingard (2010) therefore conceptualise curricular texts as palimpsests; Their meaning is transformed and contested, as they are 're-read' as they move from text production to pedagogical practice (and sometimes back).

There are pockets of resilience and counter-discursive activity (Mac and Ghail 1994 in Ball, 1997, p. 261). Whereas in some education policy implementation studies, resistance is understood as defiance to change (Santibáñez, 2008), Ball (1994, p. 11) urges us to think beyond the categories of dominance (or implementation) versus resistance in order to understand contestation, as much educational practice happens outside this dichotomy. This author, taking a post-structural approach to education policy studies, has argued that a focus on the richness and complexity of practices is essential for understanding how educational policy processes work.

Thinking of policy text in this way has implications for how the processes of re-contextualisation of global education policy are understood. Appadurai (1996) uses the role of agency and appropriation to make a case against the idea of globalisation as a totalitarian or radical transformation towards the same practice, emphasizing that policy is not embraced in all places and by all people equally. While on the one hand globalisation may unfold as processes of standardisation and homogenisation, on the other hand, unique appropriations lead to a proliferation of hybridity, difference, heterogeneity, as well as inequalities (Hill & Roskam, 2009).

In the above, I have argued for attention to localised complexity, agency, interpretation, contestation and construction of responses during the processes of re-contextualisation of the Mexican competency-based curricular reform. This conceptualisation emphasises pluralism and action. However, the interpretations of competency-based education in the curricular reform were not entirely creative, new, or unique. In specific contexts, groups of people talked in similar or patterned ways about competencies. Rather than an infinite range of possible ways to interpret competencies, a limited amount of different discourses or interpretations of competencies could be discerned, and these were linked to different interests and agendas.

Several authors have argued for a conceptualisation of policy as discourse, to account for the constraints to policy interpretation (cf. Fischer & Forester, 1993; Torgerson, 1985). Ball applies this idea to the analysis of policy to uncover the politics of policy text production, when he states that policy discourses are about "what can be said, and thought, but also about who can speak, when, where and with what authority" (1994, p. 21). Thus, policy discourses are "ways of talking about and conceptualizing policy" (Gale, 1999, p. 4). Buenfil Burgos (2000, pp. 61-62) employs a similar definition of discourse as processes of social meaning-making, which are moreover interlaced with power relations. As I argue in this thesis, in the re-contextualisation of the competency reform, there was creativity and difference in which actors interpreted and enacted

competency-based curricular reform. At the same time, this was constrained within (different) discursive frames.

In order to understand the enactment of competency-based reform, it is important to understand the social representations of policies. Curricular reforms activate complex processes of meaning or signification and re-signification. Treviño Ronzón and Cruz Vadillo, define social representation as:

Sets of socially constructed significations that guide the perception/understanding/creation of the world and their relationships; in our case, the understanding that school actors have of the reform, themselves, of those with whom they interact and of school dynamics (2014, p. 54).

In addition, Cuevas Cajiga argues that,

[t]he implementation of a reform, the acceptance or rejection, resides in local frameworks of meaning (Pérez Gómez, 2000); this is to say, in the interpretations that educational actors have of it. A reform is mediated by the meanings teachers and school managers assign to it and take them to their educational practice (2015, p. 68).

In this thesis, I pay attention to how discourses or social representations of the curricular reform played a role in its enactment. For example, when talking about resistance of teachers to the reform, a senior state MoE official in Durango pointed out:

People think that if Mexico does not follow their recommendations, there will not be resources. But the OECD or UNESCO does not have resources, that's the World Bank or the International Monetary Fund. But this idea has stuck in the social imaginary (I-ST11³).

These representations had real consequences for how education actors reacted to and enacted the competency reform.

³ I-ST11 is a unique interview code. In Sub-section 2.5.1 I explain how I arrived at these codes.

1.2.2 Imaginaries

A conceptualisation of policy as discourse and an emphasis on social representations opens the possibility for the recognition of dominant discourses. Gale (1999), in an attempt to account for why certain discourses become dominant, has conceptualised policy as ideology. Ideology is defined as “a set of concepts, beliefs, assumptions and values that *allow* events and situations to be interpreted in ways that are *appropriate* to their respective concerns” (Carr & Kemmis 1983, 114 in Gale, 1999, pp. 397, italics in original). Ball (2007 in Verger et al., 2012a) argues that neoliberalism currently is the dominant political-economic ideology worldwide. Discourses, understood as ways of talking about policy issues, produce text as well as interpret them. They appeal to ideologies in doing so.

In the literature the terms ideology and imaginary are used to refer to similar things. For example, whereas Ball (2007 in Verger et al., 2012a) refers to neoliberalism as an ‘ideology’, others, such as Rizvi (2006) refer to neoliberalism as an ‘imaginary’.⁴ Imaginaries are “collective social facts with which people define themselves and construct their relations to others, and build a world in and through modernity” (Rizvi, 2006, p. 194). Social imaginaries are embedded in every day notions and images, but also in theories and policies. They are both normative and factual in that they paint a picture of how things go as well as of how things ought to go (Taylor, 2004, p. 24 in Rizvi, 2006):

Social imaginaries play a major role in making policies authoritative, in securing consent and becoming legitimate. They provide the backdrop against which people develop a common understanding that makes possible common policy practices and a shared sense of legitimacy. They bring together factual and normative aspects of policies, and enable people to develop a shared understanding of the problems to which policies are proposed as solutions (Rizvi, 2006, p. 198).

⁴ In the literature the terms seem to be used interchangeably. Although possibly a distinction could be made between these concepts, this has not been the focus of this thesis, and the terms will be used interchangeably throughout the thesis.

Social imaginaries provide an explanation of the authority of some interpretations of competency-based approaches over others. The imaginaries on which education actors draw to shape and imagine their relationship to the world are no longer national, but have become global, and with Ball (2007 in Verger et al., 2012a), Rizvi (2006) argues that globally, a neoliberal imaginary has become dominant.

Neoliberalism, as the current dominant political-economic imaginary/ideology worldwide, frames many of the education policy ideas that circulate (Ball, 2007 in Verger et al., 2012b). Proposals such as the introduction of market mechanisms and logics (choice, competition, decentralisations), the liberalisation and privatization of the education sector, and the importation of management techniques coming from the corporate sector, resonate in the neoliberal ideational context (Verger et al., 2012b).

Within the neoliberal imaginary, most political and economic actors aim to raise their global competitiveness through education; education is perceived as a 'positional good'. These beliefs form the basis of the aspirations of most countries in the world to become 'global knowledge economies' (Verger et al., 2012b). The idea of the knowledge economy works as a powerful economic imaginary (Jessop et al., 2008 in Verger et al., 2012b). Within the neoliberal imaginary, the interest in competency-based approaches reflect the interests of sectors in society that place emphasis on tangible outcomes of education, in the form of certain abilities that allow efficient incorporation in the world of work. The idea of the globalised economy has sparked the application of standardised tests that subject students to a permanent comparison of their capabilities under the term competencies, and most curricular reforms are now oriented towards the formation of competency-based curriculums (Díaz-Barriga, 2011).

The imaginary of the knowledge economy is often associated with an educational reform jargon based on the principles of quality, learning, accountability and standards (Carney, 2009 in Verger et al., 2012b). These

related education policies together form sets of policy ensembles, which mutually reinforce each other and facilitate the choice for other policies in the ensemble. Competency-based education fitted within the policy ensemble the Alliance for Quality Education (which I discuss in Sub-section 1.4.3), which combines several policies, such as evaluation and professionalization policies, in an attempt to increase the quality of Mexican education. The choice for competency approaches was unquestioned by certain actors at the Mexican national scale as because it was part of this ensemble.

However, the neoliberal imaginary of globalisation has also given rise to different imaginaries, that now coexist. Appadurai (1996) argues that imagination, especially when it becomes collective, can be a ground for action. Throughout this thesis, I pay attention to the actors in and outside the policy arena in order to capture possible alternative competency discourses. I demonstrate that whereas in the Mexican Ministry of Education at the national scale a certain imaginary is dominant, at the subnational scales other imaginaries are authoritative, which claim to be better aligned to sentiments for democracy, public education and local context, that is, what Rizvi calls the "democratic alternative social imaginary" (2006, p. 200). In other words, the policy space that allows the global circulation of ideas and ideologies, or imaginaries, was unevenly distributed across the scales and contexts of the policy trajectory.

1.2.3 Floating signifiers

In the above, I have argued that the curricular reform can be thought of as both texts and discourse, and that imaginaries inform discourses. However, the texts of the 2009-2011 curricular reform are large and manifold. This complicated a detailed understanding of the re-contextualisation of these texts. Therefore, I have focussed on a specific element of the reform, namely the idea of competency-based education, because it was a 'red thread' running through the processes of the 2009-2011 reform, at the international, national, state, and

school scales. For example, education actors at the international scale (for example OECD) argued not to have written the Mexican curricular reform, but they did promote competency approaches to education in Mexico. Similarly, some education actors at the school scale had not read the curricular texts, but they did have ideas about competencies. I therefore use it as a vehicle to explore the story of the politics of the re-contextualisation of reforms that draw on global education ideas in Mexico.

I understand the idea of competencies as a contested concept. Conceptual contestation occurs when,

[t]he strong normative valence, that is, judgments about what 'ought to be' or 'ought not to be', associated with some concepts, often combined with other considerations, motivates users to strongly prefer a particular meaning. They may energetically defend their own usage, whereas others will contend that an alternative usage is correct (Collier et al., 2006, p. 211).

In other words, the term 'competencies' can be conceptualised as a floating signifier. Floating signifiers obtain their meaning through their position within discourses, understood as social processes of construction of meaning (signified) and connotations (Torroella, 2005, p. 96). Signifiers, such as competencies, can acquire various meanings because their empty and floating character opens the possibility of use within different discourses that reflect different political and ethical projects.

Therefore, competencies, can be associated either with "evil that has to be expelled" (Buenfil-Burgos, 2000, p. 2) (as in the interpretation of the dissident teachers' union CNTE), or with "the final road to progress" (Buenfil-Burgos, 2000), (as in the case of for example the Mexican MoE). Depending on the context and who uses it, competencies can either carry positive or negative significance. Competencies are part of an "emotional economy" (Apple, 2008, p. XI). They "resonate deeply with people's hopes and fears" (Apple, 2016, p. 128). Therefore, words and their meanings "call forth a set of responses that tie us to or cause us to reject the policies and practices that dominate our societies" (Apple, 2008, p. XI).

Signifiers are re-appropriated or re-signified from one context to another as they become fixed, that is, given meaning, within different discursive formations (for example, competencies can mean skills, as well as an integrated set of knowledge, skills and attitudes; competencies can be perceived as relevant, as well as irrelevant) (Buenfil Burgos, 2000, p. 2), which in turn draw on different social imaginaries (for example, neo-liberalism or socialism) (Urciuoli, 2008).

Floating signifiers on the one hand work as 'vague concepts' that represent an undetermined quantity of signification, but at the same time they allow "symbolic thought to operate despite the contradiction inherent in it" (Mehlman 1972, p. 23; Burgos, 2004 in Verger & Van der Kaaij, 2012). For example, although competencies can be re-signified, they still hold the promise of integration into the global knowledge economy. Because of their multiple interpretability, floating signifiers can also work to accommodate various agendas (Verger & Van der Kaaij, 2012, p. 261).

This approach allowed me to research the competency-based curricular reform, which took and was expressed in terms of different approaches as well as conceptualisations of the concept of competencies. Rather than to establish one meaning as more true than the other, the goal of the policy researcher is to trace these different meanings (Buenfil Burgos, 2000, p. 58).

In other words, the meaning of competencies "floats in different directions depending on who is speaking about it and in what context" (Buenfil-Burgos, 2000, p. 9), and moreover, policy discourses are not divorced from policy producers. Rather, "policies are represented differently by different actors and interests" (Ball, 1994, p. 17) within and across contexts. For example, in the UK of the 1980s, the idea of competencies was appropriated by the New Right. The approach was interpreted as a behaviouristic model that focused upon empirically defined performance standards. This conceptualisation fitted with the political aspirations of the New Right towards a neo-liberal market ideology and ideas about efficiency, accountability and standards (Dale and Ozga, 1993 in Halpin & Troyna, 1995). The Mexican competency-based reform is equally

susceptible to be appropriated by different groups with different interests, and that an understanding of these processes of appropriation situated in a specific contexts and times are essential for understanding the re-contextualisation of the reform.

Key interpreters (or meaning-makers) of policy texts are authoritative interpreters of policy, and they are relied upon to relate policy to contexts, or they might collectively undermine policy texts (Ball, 1994, pp. 17-18). Key interpreters can be international agencies and actors such as the OECD, who promote global imaginaries, but, as I argue throughout this thesis, whether an actor or group is a key interpreter depends on their context and the scale at which they are located. For example, at the state scale in Michoacan, the dissident teachers' union CNTE played a role as key interpreter, whereas the state MoE played a key role in the interpretation of competency policy at the scale of Durango state. These education actors tried to shape the meaning of competencies in different ways, on the basis of their interests. The politics of the re-contextualisation of the competency-based curricular reform can thus be understood as "ideological work" (Apple, 2008, p. XI), that is, the struggle and active attempts to re-define or fix the meaning of the floating signifier competencies so that it coheres with particular ideological assumptions and movements.

1.2.4 Interpretation and enactments in historical, political, cultural and material contexts

I have argued for attention to the representation of competency-based curricular reform. However, which competency approach comes to be realised, will be settled not by abstract conceptual debates, but within real world contexts where these different competency discourses become associated with conflicting interests and are materialised in different practices. Hence, it is important to locate the debates and struggles over competency policy within

substantive contexts, and to explore its potential for promoting or suppressing different possibilities (Jones & Moore, 1995).

The idea of policy enactment is a theoretically rich concept which allows an understanding of the different ways in which policies are read alongside or against contextual factors. The idea of enactment also accommodates a focus on policy as both text and discourse. Different individuals and groups of actors interpret and enact policy differently in specific contexts (Ball et al., 2012, p. 11). Rizvi and Kemmis argue that teachers:

Interpret policy in their own terms, in relation to their own understanding, desires, values and purposes, and in relation to the means available to them. Policies will be interpreted differently as the histories, experience, values, purposes and interests which make up any arena differ (1987, in Bowe et al., 1992, p. 22).

Throughout the thesis, I place the concepts of interpretation and enactment alongside each other, in order to distinguish between processes of meaning-making, interpretations and discourses about CBE, and processes of putting policy into practice or enactment, which together I call re-contextualisation.⁵

The idea of policy enactment helps to understand the way curricular policies that draw on global policy ideas such as competencies are re-contextualised. Although globalisation presents common features around the world, the effects of globalisation in education policy are mediated by domestic history and politics, and by the complex interplay of global and local forces, among other contingencies. Borrowed or global policy ideas are modified, indigenised or resisted as they are enacted in the different contexts of different countries (Schriewer 2000; Philips et al 2003; Steiner-Khamsi 2004; Steiner-Khamsi et al. 2006 Verger et al., 2012b). Braun et al. (2010) point out that these sorts of contextual constraints, pressures and enablers of policy enactments tend to be

⁵ An in-depth review of the enactment literature shows that different conceptualisations of the term are used. That is, on the one hand "enactment" is taken to include both "interpretation" and "translation", as in the following quote: "policy enactment involves creative processes of interpretation and translation, that is, the recontextualisation" (Braun et al., 2011, p. 586). On the other hand, it is used in a similar way as in this thesis, namely, *alongside* "interpretation".

neglected. As Ball argues: “We have assumed the adjustment of teachers and context to policy but failed to research the adjustment of policy to context” (1994, p. 19).

Ball has referred to context as “circumstances in which we work” (1994, p. 19). The idea of attention to context fits with the idea of policy as processes, where process refers to the processes of meaning-making and enactment that take place and are inseparable from context, or “the conditions of teaching and learning” (Phillips, 1989, p. 272). Authors have pointed to several aspects of the context in shaping policy enactment. First of all, global policies enter very different national systems with particular cultural and political histories and are mediated by them (Ball, 2012, p. 16). Although global policies imply certain homogenisation of criteria, values, strategies and neoliberal measures, these are mediated by historical, cultural, economic, and political conditions in particular sites (Buenfil Burgos, 2000).

Political mediations and institutions shape the adaptation of global policies. According to Taylor et al. (2000, in Verger et al., 2012b), political ideology is one of the main reasons why education policies that draw on global discourse are not contextualised equally. Government ideologies (market-liberal, liberal-democratic, and social-democratic⁶) represent a key filter when it comes to adopting international recommendations in educational policy. In addition, cultural contexts, such as public sentiments (for example, whether education is perceived as public or private good) mediate re-contextualisation. Thus, what happens inside a school in terms of how policies are interpreted and enacted will be mediated by institutional factors” (Ball, Maguire, & Braun, 2012, p. 10).

In addition, the material contexts of implementation, such as infrastructure or the existence of teaching material, also mediate the translation of the competency curricular reform (Ball et al., 2012; Braun et al., 2011). Some education models might work in consolidated, well-funded, highly

⁶ Although ideologies are rarely ‘pure’ or mutually opposing.

professionalised and well-regulated systems, with enough material and human resources and technical capacities (Verger et al., 2012b). These conditions are distributed unequally over different contexts, such as rural and urban contexts (Chisholm & Leyendecker, 2008, p. 687). This points to the importance of understanding the subjective interpretations of competency-based reform within a set of “objective conditions” (Ball et al., 2012, p. 21) in order to make better sense of policy enactments.

1.2.5 Interpretations and enactments at different scales

Globalisation results in different and unequal consequences because of differences in contextual capacity and cultural and political factors. These elements are differently structured between the national and school scales (Carnoy et al., 2002 in Verger et al., 2012b). For example, Buenfil Burgos (2000, p. 68) argues that the meaning of education policy changes as it is displaced and reinterpreted throughout different institutional scales, as terms are taken from one discursive context and placed into another, where they become intertwined with dimensions of historical, political and cultural elements. In the Mexican context, the politics of the reformulation of the policy idea competency-based education took place differently, for example, between the national government and state governments.

In line with Stubbs (2005) I conceptualise scales as different levels of government (international, national, state, and school).⁷ However, at these

⁷ There is a recent interest in education policy studies in multi-level and multi-scalar approaches (For an interesting discussion of the concepts of level and scale in research see: Stubbs, 2005). There seems to be some confusion with regard to concepts and meaning. Within these studies, scales are sometimes conceptualised as ‘the global, national and local’. Equally, interview research with actors within international institutions is sometimes taken to mean studying the ‘global’ (cf. Vidovich & O’Donoghue, 2003). I would argue instead that this is still micro-level research, but at the higher scale of (international) government. (After all, interpretations and enactments of education actors in international organisations are still ‘local’.) In this thesis, I therefore employ the term scale, referring to scales of government, rather than the idea of micro-, meso-, and macro ‘levels of analysis’, which refers to levels of abstraction. I do not pretend to conduct macro-level structural analysis of globalisation processes. Rather, I research

scales, I research both state and non-state education actors that were involved in the processes around the reform. This operationalisation was arrived at in close interaction with the literature and the research observations. For example, in the specific Mexican context, the Mexican national MoE points to the importance of actors operating at the international, national, state and school scale in the Mexican education process (SEB/SEP, 2011). During my fieldwork, in a presentation for the International Seminar about integral education, the then sub-secretary of basic education argued that national, state, and school actors play an important role in the Mexican education policy process. This is where different competency discourses were articulated in the processes around the competency-based curricular, and above all, there were important inequalities, for example between and within the states and schools. For example, there was an important difference in the interpretation of the competency approach between the states of Michoacan and Durango, and at the same time, there was a difference between the interpretation of state actors and teachers in the classroom.

Studies interested in the politics of education reforms, sometimes focus on one phase of the policy process, for example the writing of the policy text (cf. Thomas, ND), or the enactment of a certain policy in school contexts. Conceptualizing 'competencies' as a floating signifier allowed me to study education policy all the way through its trajectory, from the adoption at the Mexican national scale, the temporary settlement of the signifier in text, to the re-enactment and interpretation at different scales, by different actors, in different contexts, and over time.

I explore what about the scales was significant for actors, for example how actors were differently positioned vis-a-vis other scales. There was a certain hierarchical power that came with being an actor positioned at 'higher' scales of

the interpretations and enactments of different education actors at different scales of government, albeit within more structural constraints such as education discourses, political and socio-economic factors.

government. For example, on the one hand, the national MoE used the evaluation ENLACE - which tests for knowledge/content rather than competency (Aboites, 2009) - as a tool to guide the interpretation of competency-based education towards a narrowly defined version. On the other hand, teachers were powerful in their school contexts in the sense that they perceived room for manoeuvre, that is, the freedom to interpret and enact the competency-reform as long as they politically and discursively supported their superiors and/or teachers' unions. This idea of production of hierarchies between different scales comes close to Stubbs' (2005) definition of multi-scalar research.

Moreover, researching the re-contextualisation of the policy idea at different scales provided me with an understanding of how the interpretations and enactment of actors at one scale were influenced and shaped by the interpretations and enactment of actors at another scale.⁸ As such, looking at the re-contextualisation of the trajectory of competency policy at different scales of government allows me to explore the re-contextualisation process *cross-sectionally*, rather than at a single scale (Ball, 1994, p. 26). I therefore conceptualise the scales as interconnected, in line with Bowe et al. (1992), who suggest analysing the policy process as a non-linear and interactive trajectory, where the different scales of the trajectory are connected, and where information flows (or does not flow) between them.

1.3 Research questions

The research questions that guided the research for this thesis follow from the conceptualisation of the process of re-contextualisation of Mexican education policy described above. They are structured around the conceptual ideas of

⁸ However, education actors often operated at different scales, which means they did not exclusively belong to one scale. For example, one of the international actors was also a consultant to the national government, researcher and Mexican university lecturer. Several teachers at the school scale, were involved in state politics and could therefore be called school and state actors.

policy as text and discourse, imaginaries, floating signifiers and enactment, and incorporate both hierarchical (scales) and contextual (different socio-economic, political of different geographical sites) elements. The main question that guides this thesis is:

How is the Mexican competency-based curricular reform to primary education adopted, transformed and contested along its policy trajectory?

From this main question, several sub-questions follow:

- 1. What does competency mean to different education actors in the competency-based reform at the national, state and school scales in Michoacan and Durango?*
- 2. How is the competency-based curricular reform enacted at the national, state and school scales in Michoacan and Durango?*
- 3. How are these processes and practices shaped by global, national, state and school contexts in Michoacan and Durango?*

I approach the first sub-question by discussing in detail how the floating signifier competency acquired meaning in the competency-based curricular reform for different education actors at the different scales and in different contexts. within different discourses and imaginaries. I firstly discuss the curricular texts of the reform in Chapter 4, and, secondly, in the representations of education actors at the national, state and school scales in Chapters 5-7.

The second sub-question, elaborates on how the representations of competency in the competency-based curricular reform are linked to different enactments at the different scales and in different contexts. In Chapters 5-7, I provide a discussion of these different practices.

The third sub-question, expounds on how the interpretations and enactments of the competency-based curricular reform were shaped by political and material elements of the global, national, state and school contexts in Michoacan and Durango. I discuss these issues throughout Chapters 5-7.

1.4 Political context to Mexican education

In this section, I briefly discuss the Mexican political projects since the 1980s, and the education projects that they promoted, as well as how these drew on international actors and discourses. In Chapter 3, I discuss in more detail how competency-based education specifically fitted within these political projects and imaginaries, and how they were contextualised in Mexico. I start the discussion of the Mexican education political project in the 1980s, because not only did this represent an important change in Mexican history towards a neoliberal project, which was inherently linked to the introduction of competency-based education, but the reforms proposed in the 1980s also form the basis and main thread of reforms today (Arnaut & Giorguli, 2010).

1.4.1 1980-1990s: Modernisation

The Mexican political and economic project that started in the 1980s reflected a "milestone of change and transformation" (Arnaut & Giorguli, 2010). Although still ruled by the Institutional Revolutionary Party⁹ (PRI) that had been in power since the 1920s, towards the end of the 1980s, during the Salinas de Gortari (1988-1994), and Ernesto Zedillo (1994-2000) administrations, Mexico moved away from the welfare state and Keynesian economic model (Quezada Ortega, 2001, p. 107). It set out to join the international neoliberal calls for liberalisation, privatisation, decentralisation and compensatory programmes, which had stimulated governments around the world to reorganise the responsibilities of the state. The administrations disconnected themselves from revolutionary nationalism and the Mexican Revolution, and proposed modernisation, which implied a number of important adjustments to the pillars of the post-revolutionary state, the rethinking of its core tasks, and the technocratization of policy (Miranda, 1992). The administrations adopted social liberalism as the social imaginary of reforms; a euphemism for neoliberalism. Similar to other

⁹ *Partido Revolucionario Institucional.*

countries in Latin America, the Mexican government set out to liberalise its economy, privatise large public enterprises (telephone, railroads, banks), and become part of the big international economic alliances (de Anda, 2011; Maria de Ibarrola, 1995; Moreno Moreno, 2010, ND; Sesento Garcia, 2008). It signed important trade agreements,¹⁰ and became part of the Organisation for Economic Co-operation and Development (OECD).¹¹

Although Mexico had always had relations with international organisations such as United Nations Educational, Scientific and Cultural Organisation (UNESCO), during the 1990s, the influence shifted towards financial organisations. The projects of these organisations, transmitted a particular way of conceiving education, development of the education system and society (Arnaut & Giorguli, 2010, pp. 660-661), that is, a neoliberal project that subordinated education to economic views and needs, inscribing on education a managerial administration.

The Mexican education situation cannot be understood without the role of the National Union of Education Workers¹² (SNTE). The post-revolution Mexican state had organised the society in trade unions.¹³ Although they were originally intended as autonomous and progressive organisations, they promptly became subordinated to the president, functioning mainly as a way to legitimise the state (Loyo-Brambila, 2008). The SNTE, with an average of 1 million 500 thousand members¹⁴ divided into different geographical sections, is the largest teachers' union in Latin America. It is one of the most disciplined syndicates, and has been called a 'civil army' (Loyo-Brambila, 2008, p. 20), because of its

¹⁰ The General Agreement on Tariffs and Trade (GATT) in 1986 (this later became the World Trade Organisation (WTO)) and the North American Free Trade Agreement (NAFTA) in 1992.

¹¹ In 1994.

¹² *Sindicato Nacional de Trabajadores de la Educación.*

¹³ *Sindicatos.*

¹⁴ Official data has been problematic for two reasons, one the one hand, since the 1970s teachers could obtain a double contract (*doble plaza*) to work in two different schools which duplicates the record. On the other hand, the government of Mexico has been proven to inflate statistics to report economic growth (de Ibarrola, 1995).

participation in electoral promotion. The neoliberal economic reforms started in the 1980s did not diminish the power of the unions. The SNTE survived the reforms, and its members enjoyed higher income and benefits, and its leaders gained more influence (Ornelas, 2008a, p. 446). And perhaps somewhat counterintuitive for a teachers' union, the Mexican SNTE rapidly adopts the latest neoliberal globalisation jargon (Street, 2003).

The influence of the SNTE over Mexican education was not without contestation. Since its foundation in the 1980s, the dissident teachers' union CNTE, which draws on more radical, left-leaning ideologies (Santibáñez & Jarillo Rabling, 2006, p. 4), has mobilised for better salaries, democratic reform of the SNTE union leadership, and against neoliberal education reforms. Street describes the CNTE's representation of neoliberalism as "the subordination of education to the macro economy" and a "historical period in global capitalism and as a series of nation-state policies" (2003, pp. 179-180). She points out however, that Mexican teachers socialised in struggles for union democracy tend to overextend their use of 'neoliberalism', envisioning in the term all the attributes of the (class) enemy. The CNTE's challenge of the SNTE intensified the political nature of Mexican education (Street, 2003, p. 179), but according to Loyo Brambila (2010), its actions have mainly had local and regional effects.

A common strategy of the Mexican government since the 1980s has been the use of pact-making with the SNTE for the design and administration of education policies (Loaeza & Prud'homme, 2012). Although these non-formal political procedures can provide quick resolutions to conflict situations, according to Loaeza (2012), it has added to the undermining of the Mexican government as it circumvented the legislature and administrative procedures. The education pact National Agreement for the Modernisation of Basic Education¹⁵ (ANMEB),- signed by the national government bureaucracy, the SNTE, and the state governments -, stipulated the education policy ensemble of the 1990s. For their acceptance of the decentralisation of education, the SNTE

¹⁵ *Acuerdo Nacional para la Modernización de la Educación Básica.*

obtained concessions from the government, such as salary increases and incentives, as well as positions within the Sub-secretariat of Basic Education (Ornelas, 2008a, p. 455).

The main goals of Mexican education reforms in the 1990s as established in the ANMEB, were to improve quality, equity and relevance, which replaced the prior goals of investment in expanding education and nationalist education for social cohesion. An important strategy towards these goals was decentralisation (Ornelas, 2004, p. 399). Decentralization was contextualised in a particular Mexican way: although administrative functions were transferred to the states, these did not obtain the political control of education reform. The national government maintained the control over the development of the national curriculum and textbooks, evaluation, and it contributed more than eighty per cent to education spending (Ornelas, 2008b, p. 21).

The ANMEB established education evaluation as a mechanism linked to management, accountability, incentives, and social control over education, mainly in basic education. Mexico started to participate in the international test Trends in Mathematics and Sciences Study TIMMS (in 1995), and the Programme for International Student Assessment PISA (in 2000). PISA is developed by the OECD, and aims to monitor the extent to which students near the end of compulsory schooling have acquired the knowledge and skills essential for participation in society (OCDE, ND).

These became key references for the development of a national evaluation system. Also, based on the idea that the teacher plays an essential role in improvement of the quality of education, school effectiveness, and student learning, Mexico started to experiment with incentive schemes that improve compensations to the best teachers. The National teacher incentive programme Carrera Magisterial (CM) was a key element of the 1992 ANMEB. The allocation of incentives considered, among other things, teachers' training and students' learning. The teachers' union SNTE has played an important role in the design of CM and allocation of incentives among teachers (Arnaut & Giorguli, 2010).

1.4.2 2000-2006: *New political party, new education policies?*

On 2 July 2000, with the election of president Vicente Fox from the centre-right wing National Action Party¹⁶ (PAN), the 71 year reign of the Institutional Revolutionary Party (PRI) came to an end. The election generated big expectations for change in the political, social and educational field (Miranda López, 2004), but once in office, the PAN administration adjusted its political discourse. The administration advanced the agenda of deregulation of the economy and the opening up to international markets, and the national MoE continued the basic education reform patterns designed in the 1990s (Ornelas, 2004).

In order to create a broad social participation mechanism, the government launched the pact Social Commitment for Quality Education¹⁷. This pact involved not just the key actors in the educational system (MoE, the SNTE and state governments), but also included a variety of additional players such as civil society, business, and academic institutions (Ornelas, 2004). The contents of the agreement expressed an important education policy rhetoric, closely linked to improving equity and educational quality in a broad framework of social co-responsibility. It also showed international influences, especially those based on policy ideals such as Education for All (EFA) and investment in basic education promoted by UNESCO and the World Bank (UNESCO 1990; World Bank 1994). Ornelas (2004, p. 401) argues that the PAN administration had wished to promote some reforms, such as religious education, privatisation, and the elimination of the national textbooks commission. However, the continuity in education reforms because president Fox was convinced by his advisors that such a move could create social conflict with the SNTE, the PRI and left-wing parties.

¹⁶ *Partido Acción Nacional.*

¹⁷ *Compromiso Social por la Calidad de la Educación.*

Despite its ambitious rhetoric, the effectiveness of the pact was limited, due to, among other reasons, the lack of specific commitments and goals to be achieved by the system and each of the actors involved. However, the pact placed some important issues on the political agenda that became major axes of the educational activities of the government, such as the establishment of the National Institute for Educational Evaluation¹⁸ (INEE), the Mexican National Exam of Academic Achievement in Schools¹⁹ (ENLACE), and the entrance exams to the teaching profession and management positions of basic education (Arnaut & Giorguli, 2010, p. 44).

In the curricular field the need for reform of preschool and secondary education was raised, as I discuss in more detail in Section 3.2.

1.4.3 2006-2012 Colonisation of the MoE by the SNTE

In 2006, another PAN candidate, Felipe Calderon Hinojosa, took power. His political agenda aimed to further advance former president Fox's education policies that were linked to the deregulation of the economy and the opening up to international markets. From his first day in power, Calderon declared war to the Mexican drug cartels, which although it was applauded by those who were longing for the strengthening of the State in places where drug lords and informal institutions had been ruling, relegated aims to tackle the inefficient education system to the background (Vázquez Moyers & Espino Sánchez, 2015).

Calderon proposed structural reforms to counter Mexico's difficult growth performance (Bernstein, 2015), such as the liberalization of the last public enterprises (oil and energy), opening of the telecommunications sector, the flexibilization of the labour market. In education his reforms aimed to make the

¹⁸ *Instituto Nacional para la Evaluación de la Educación.*

¹⁹ *Examen Nacional del Logro Académico en Centros Escolares.* ENLACE is a standardised, multiple choice exam which is applied yearly to years 3-6 of all primary schools since 2006. The test evaluates Spanish, Maths and one additional rotating subject.

system more transparent and merit-based by introducing evaluations and performance tests, and to create a knowledge-based education system that would prepare Mexicans to face the challenges of the highly competitive global labour market (Bernstein, 2015, p. 4).

During the Calderon administration, the SNTE achieved the height of its power (Ornelas, 2008a, 2012). The political party that had been created by its leader Elba Esther Gordillo, had helped Calderon win the elections. In turn, the SNTE positioned people loyal to the union in strategic places within the MoE. The Sub-secretariat of Basic Education, which was in charge of developing the competency-based curricular reform, was headed by José Fernando González Sánchez, the son in law of Gordillo (Auli Silva, 2015). Ornelas (2012) sums up the influence of the SNTE as the ‘colonisation’ of the MoE, and Navarro Gallegos (2009, 2011) speaks about the ‘kidnapping’ of the MoE by the SNTE. The directors of the curricular reform, as well as the directors of the different MoE departments, were all affiliated or held positions within the SNTE.

In May 2008, the national government and the National Union of Education Workers (SNTE) signed the education pact Alliance for Education Quality²⁰ (ACE). This education pact forms the backdrop, or policy ensemble, of the competency-based curricular reform to primary education. The ACE was presented as a public policy package to transform the Mexican education model towards quality education (Gobierno de Mexico & SNTE, 2008). It consists of five areas and ten lines of action, that together aim to better the quality of education through policies directed at schools, teachers and students. They are presented in Table 1 below.

Table 1: Areas and lines of action of the Alliance for Quality Education

Objective	Lines of Action
	Axis 1. Modernisation of infrastructure and equipment Information and communication technology

²⁰ *Alianza por la Calidad de la Educación.*

Improve the quality of education	Management and social participation
	Axis 2. Professionalization of teachers and education authorities
	Salary and promotion
	Professionalization
	Incentives
	Axis 3. Wellbeing and holistic development of pupils
	Health and nutrition
	Social conditions to increase access
	Staying in school and timely graduation
	Axis 4. Education for life and work
Reform of the Curriculum	
Axis 5. Evaluation	
Evaluation	

Source: Gobierno de Mexico and SNTE (2008)

As part of the ACE, the renewal of the teacher incentives scheme Carrera Magisterial was established. The ACE reiterated the idea that there is a need for better prepared teachers, with greater competencies, who can improve the quality of education, in order to compensate the socioeconomic disadvantages of many Mexican students (Arnaut & Giorguli, 2010, p. 128).

The ACE received support at the Mexican national and international scale. The leader of the teachers' union SNTE Gordillo called the ACE "the beginning of an education revolution" (OCE, 2008, p. 20). She was quoted in the Mexican newspaper *la Jornada* stating that "there is just no better alternative proposal for raising education quality than the Alliance for Education Quality" (Avilés, 3 February 2011). The Mexican national government presented the ACE as "the medicine that would cure basic education" (Editorial, 2008, p. 5), and according to Hernández Navarro (2009) the World Bank and the OECD applauded it as an effort towards a better Mexico (Editorial, 16 May 2008).

However, academics critiqued the decision of President Calderon to give the SNTE a key position in the MoE and the education policy process. Loyo Brambila (2010) for example argues that the ACE was an elitist pact, from which

other education actors, such as the state governments, had been excluded. In addition, this author argues that the ACE lacked a clear educational agenda, had little regard for the purposes of educational development within a future project of the nation, and over-emphasised the importance of evaluation. Hernandez Navarro (2009) argues that the ACE was a copy of the No Child Left Behind (NCLB) act in the United States, which over-emphasised quantitative evaluation and opened the door to the privatization of education. By copying the NCLB, this author argues, the ACE did not aim to recover the best national educational traditions, nor reflect on successful educational practices of countries of academic excellence.

Since its signing in 2008, the ACE and the policies proposed by it have been resisted in the states of Morelos, Quintana Roo, Guerrero, Oaxaca, and Michoacan (María de Ibarrola, 2008), strongholds of the dissident teachers' union CNTE. The state administrations of Zacatecas, Guerrero, Oaxaca, and Michoacan, openly rejected the ACE (Ornelas, 2012, p. 237).

It has been stated that the ACE has generated the most controversies among sectors of teachers and civil society (Chacón Ángel & Rodríguez Olivero, 2009). Yet, the response of the government was that "the purpose of quality of education is not negotiable, because negotiating in favour of the poor quality or the permanence of backlogs that obstruct and impede quality would be like to be willing to negotiate in favour of discrimination, exclusion and the denial of the fundamental right of children" (Román, 7 Octubre 2008).

Part of the ACE was the curricular reform to primary education, which I discuss in detail in the remainder of this thesis.

1.4.4 2012: Return of the PRI

This political and economic situation pivoted the return of the PRI to power towards the end of 2012. President Enrique Peña Nieto's focus was on restoring the State's power and to continue to implement the financial, energy, political

and education reforms that further aimed to 'modernise' Mexico. Despite the fact that Peña Nieto's victory was full of irregularities which sent millions to the streets to protest (Ugarte, 2012), he managed to secure the support of all the political parties from day one of his mandate, through the national education political agreement Pact for Mexico.²¹ This agreement has allowed Peña Nieto to publish around forty major economic and political reforms, including the liberalization of the energy sector and an education reform that reformed the entry and progression of teachers in the profession on the basis of evaluations (Gobierno de Mexico, 2012).

Part of regaining the governance over education was to thwart the power of the union SNTE over education, and Elba Esther Gordillo in particular, who had increasingly critiqued teacher evaluations. In February 2013, the lifelong presidency of Gordillo came to an end when she was jailed on the basis of corruption charges. Her detention was a strong message of the new PRI administration: the SNTE was no longer part of the new government plan. The lack of protest from the SNTE after her detention was a clear signal that Peña Nieto had accomplished an agreement with the political elite to erase the powerful SNTE leader from the political arena (Auli Silva, 2015). Exactly one week later, President Peña Nieto announced his education reform plans, as well as a new SNTE leader, who promised full cooperation to the Pact for Mexico (Montalvo, 2013).

1.4.5 Homogenisation or heterogenisation? Effects of global trends on Mexican education

In the above discussion I have emphasised how at the national scale, Mexico has adopted a neoliberal discourse, which has shaped its education reforms. Reform in the Mexican education system accords with global patterns of liberalisation,

²¹ *Pacto por México.*

decentralisation and accountability. Also, despite expectations of change generated by the replacement of the ruling party that had been dominant for seventy-one years, there has been far more continuity than change in Mexican educational politics.

Moreover, some education researchers argued that global trends have not gained ground in practice in Mexico (cf. Ornelas, 2004). Privatisation of education has never been an explicit aim of the government, while decentralisation of management was counter-balanced by the centralisation of power. Social participation in the educational system has been a matter of rhetoric rather than a public policy. And although the Mexican government emphasised the need for evaluation mechanisms for decision-making, at the same time it was not prepared to accept the political and social consequences and therefore seldom publically disseminated results (Arnaut & Giorguli, 2010).

Researchers have pointed out that it is important to distinguish between policy discourses and education practices (Ornelas, 2003). However, Street (2003) argues that Mexican research has not generated a body of results that can speak to (global, neoliberal) school reform processes in terms other than those of traditional school ethnography. She argues that although Mexican educational ethnography has blossomed over the past fifteen years, it is still incapable of offering a clear and general vision of tendencies that could be compared with results in other countries, and researchers tend to pay little attention to global forces operating within the (sub)national educational system.

1.5 Thesis structure

I present the policy trajectory methodological design, as well as the important contextual aspects of the research sites and research participants, the methods of data construction and analysis, ethics and limitations in Chapter 2. In Chapter 3, I discuss the history of competency-based curricular approaches in Mexico, before its adoption and adaptation in the curricular reform to primary education. This chapter serves as an introduction to the idea of competency-

based approaches as a floating signifier. Then, in Chapter 4, I discuss the temporary settlement of the 2009-2011 competency-based curricular reform to primary education into different competency-based approaches to produce heterogeneous curricular texts. In Chapters 5-7, I discuss the re-contextualisation of the competency-based reform by education actors, first at the national, then the state, and then the school scales of the policy trajectory. In the concluding Chapter 8, I draw together the main findings of these chapters with theoretical ideas, and suggest areas for further research.

Chapter 2 Methodology - A policy trajectory study of the re-contextualisation of competency-based education in Mexico

*The north works, the centre thinks and the south fights*²²

(Mexican saying).

There are three realities in Mexico. First of all, we have a lot of policy and legal documents, so on paper, Mexico looks beautiful. Only the right to love is not fixed in documents! Then there are the discourses and words. And lastly there are the practices, facts, and structural relations

(I-NA12).

This chapter presents the methodological design of the study of the re-contextualisation of the 2009-2011 competency-based curricular reform in Mexico. Specifically, I reflect on how I set about to research the politics of reinterpretation and enactment of the floating signifier competencies, by different actors at the varying scales of government, and in different contexts. I also outline and reflect on the process of data construction, analysis and interpretation.

In Section 2.1, I justify the adoption of a qualitative research approach and describe the philosophical foundations of this thesis. Then, in Section 2.2, I describe the field research design, which combines a policy trajectory study approach with education policy ethnography. I discuss the process of selection of the research sites and participants in Section 2.3, followed by a description of the specific methods of research and analysis in Section 2.4. Lastly, in Section 2.5, I reflect on the ethical issues and limitations of this thesis.

²² *El norte trabaja, el centro piensa, el sur lucha.*

2.1 A qualitative approach to researching the re-contextualisation of global education policies

For this thesis, I drew on qualitative methodologies. Qualitative research has been used to study the complex processes of the re-contextualisation of global policies (Verger et al., 2012b). The emphasis in this type of research is on understanding the social world and contextuality through an examination of the interpretation of that socially constructed world by its participants (Denzin & Lincoln, 2008, p. 14). This fitted the aim of trying to understand actors' meaning-making and enactment of competency policy. A qualitative approach was apt for studying the processes, ideas, and discourses surrounding the competency-based reform, which would be easily lost in more quantitative research designs (Soeterik, 2013, p. 64). Lastly, a qualitative approach was well suited to capture political dimensions in education policy processes, specifically issues of power and the agency of actors, participation, voice, and interests (Simons et al., 2009).

2.1.1 Philosophical considerations: moving from post-structuralism towards critical realism

Specifying ontological and epistemological stances have real consequences for research. As I was interested in capturing the politics of education policy-making, I was initially drawn to the critical theory orientation within education policy studies (Cf. Simons et al., 2009); a field rooted in research traditions interested in the power, politics and social regulation in and around schools, and confronting the crisis of the welfare state. Research within this field often draws on critical theory, which is suspicious of 'claims to truth' of our socially and culturally constructed meanings. Although critical theory acknowledges that meanings are socially constructed, it emphasises that particular sets of meanings, precisely because they have come into being in unequal social existence, exist to serve hegemonic interests. Each set of meanings supports particular power structures in a world that is a battleground of hegemonic interests, which lead to and reproduce disparities in the distribution of power (Crotty, 1998, pp. 59-63). Research grounded in critical methodology also

“seeks to document the process of empowerment of voice and human agency” (Lopes Cardozo, 2011, p. 24) and as such it was useful for understanding the ways education actors were able to appropriate and re-create (that is, their room for manoeuvre) the meanings of education policies that draw on global policy ideas in Mexico.

In line with critical policy analysis, this thesis starts from a post-structuralist concern with plurality of meaning and instability of meaning of concepts, a replacement of the policy text writer/author as the primary subject of inquiry to readers as a source for meaning, an interrogation of binary oppositions,²³ and an interest in contexts of practice and localised complexity (cf. Ball, 1994; Scott & Marshall, 2009). Moreover, a post-structuralist approach to policy research was apt to capture the different trajectories of re-contextualisation (interpretations and enactments) that policy ideas such competency-based education took on at the different scales and within the different contexts.

However, while a post-structural focus on localised complexities and experiences allowed me to understand the lived experiences of the competency reform in local contexts, post-structuralism also has a tendency to relativize the ‘interpretations of things’ as the end of the story. However, when the dissident teachers’ union CNTE in Michoacan would argue that competency policy would lead to a reduction of education to “a-critical training for the labour market”, I wanted to be able to make some claims as to whether this was the case. Moreover, although I found that the interpretation and politicisation of the (material) contexts in which teachers work were essential to understand the enactment of the reform (for example, both Michoacan and Durango have many rural teachers, however only in Michoacan was the rural context problematized

²³ Post-structuralist traditions within social research question the use in traditional Western philosophy of dualisms, or binary oppositions, to classify or organise relations of the world (McAnulla, 2002, p. 282), such as the binary opposition between the category of ‘policy maker’ (often individuals within the state) versus ‘policy implementers’ (often teacher). As I discussed in Section 1.2, post-structural education policy research questions this distinction, arguing that much of the policy-making is done in the classroom, which has consequences for how we think of the effects of policy ideas that draw on global discourses and imaginaries.

as part of the critique of the reform), the material context does shape the enactment of competency-based curricular reform differently within and between contexts. It was therefore important to understand how the interpretations and enactments of the curricular reform were shaped by structural, that is, material contextual conditions that defined the range of actions available to actors (McAnulla, 2002, p. 271).

In the later stages of the fieldwork, I therefore developed an interest in ideas from the critical, cultural political economy approach to the study of the globalisation of 'education', as developed by Robertson & Dale (Robertson & Dale, 2015). Taking both the cultural turn in research seriously, as well as the materialities of economics and politics, this approach allowed me to analyse the intersubjective and localised complexity of meaning-making of competencies and the competency-based curricular reform within the political and economic or material constraints that education actors faced.

The critical, cultural political economy of education approach draws on critical realist ontology. Critical realism is seen by some as a way out of naive positivism, and post-structuralism (Denzin & Lincoln 2008: 17), which provided me with a way out of the relativist tendencies of post-structuralism. After Lopes Cardozo (2011), I argue, that a critical, cultural political economy of education approach provided a way of unpacking the complex ways in which representations/voices/discourses/ideas/imaginaries (such as the knowledge society, neoliberal education, 'holistic' education, or socialist development), actors/institutions (such as the Mexican national and state MoE, academics, teachers' unions, or teachers), and material capabilities/power (resources, union membership, provision of teacher training, educational materials, teachers' salaries, education infrastructure) were mobilised through social processes surrounding the competency reform of primary education, which aimed to strategically and selectively advance a specific imagined Mexico, and produce certain outcomes related to education and other aspects of society.

2.2 Field research design: policy trajectory study

For the methodological design of this study on the re-contextualisation of the interpretation and enactment of competency-reform in different contexts and across different scales, I have drawn on the work about policy trajectory studies (S. Ball, 1993, 1994; Bowe et al., 1992; Gale, 1999; Liasidou, 2009; Lingard & Garrick, 1997; Power et al., 2004; Vidovich, 1997, 1999, 2001a, 2001b, 2002, 2003, 2007a, 2007b; Vidovich & O'Donoghue, 2003; Vidovich et al., 2012; Vidovich & Porter, 1997, 1999).

Ball (1994, p. 26) has argued that the analytical consequence of an understanding of policy as both text and discourse, as a multi-layered policy process with policy evolving and being constructed and re-constructed across different scales and contexts, is to conduct a policy trajectory study. Policy trajectory research traces policy processes from their formulation stage through to the recipients of a policy. The model acknowledges the politics within policy as text and process (Simons et al., 2009, p. 76).

Taking a policy trajectory approach to the study of the contextualisation of Mexican competency policy allowed me to explore the policy process *all the way through* its trajectories as well as *cross-sectionally*, rather than at a single scale (for example, the reception of global education policy (GEP) at the national scale or the enactment of global policy in classrooms), or one context (for example, studies that focus on one classroom). Lingard and Garrick (1997, p. 177) have warned there is a potential for trajectory studies to present too linear a conception of the relationship between policy production and policy practice. Therefore, in my thesis, I also emphasise the interconnectedness of scales. Bowe et al. (1992) and Taylor (1997) both suggest analysing the policy process as a non-linear and interactive trajectory, to enable exploration of how the different scales of the trajectory are connected, and in which way information flows (or does not flow).

Policy trajectory studies distinguish between a *context of influence* - where interest groups struggle over the construction of policy discourses; a *context of*

text production - where texts represent policy; and a *context of practice* - where policy is subject to interpretation and recreation) (Bowe et al., 1992). Taylor et al. (1997) make a similar distinction between context, text and consequences of policy. The context of a specific policy includes the study of economic, social and political factors; influences of pressure groups and social movements; and the study of the historical background including past initiatives upon which new policies are built. The study of the text includes a focus on the politics and related tensions and ambiguities within the policy text, and, for instance, the presence of particular discourses and/or ideologies (on diversity for example). Consequences refer to interpretation and implementation of policies at different scales and over different periods of time, and to the politics surrounding the translation of policies.

I used the above distinction in order to construct the trajectories of the competency policy and organise the structure of the chapters of this thesis. In Chapters 3, I discuss the context of influence to the reform to primary education, where competency discourses are constructed. In Chapter 4, I focus on the curricular text. In Chapter 5, I elaborate on the processes of text production and interpretation at the Mexican national scale. In Chapters 6 and 7, I discuss the interpretation and enactment of the text (context of practice) at the state and school scales of the trajectory. Bowe et al. (1992) also account for a more macro/structural context of policy outcomes/effects. Although the reform processes were underway too short to be able to research the structural effect, in the conclusion I reflect on the effects on the basis of the ethnographic data.

In order to access the processes of meaning-making and enactment of competency policy in different contexts, I drew on education policy ethnographic methodology. Ball employs ethnography to "access 'situated' discourses and 'specific tactics' and precise and tenuous power relations operating in local settings" (1994, p. 2). Critical ethnography fitted the purposes of this thesis, because,

[i]t offers a way of bringing into play the concerns and interests and diverse voices of marginalised or oppressed social groups, as well as a

way of accessing the voices of authority and influence (Gewirtz and Ozga, 1990 in Ball, 1994, p. 3).

As a policy researcher, I am interested in understanding the political processes and the social challenges surrounding education reform in Mexico. A critical ethnographic design fitted the purposes of this research, because it “enables (...) a focus upon and [possibility to] explore ‘events’ and spaces which divide those in struggle” (Ball, 1994, p. 3).

Equally, Ball (1994) argues that taking an ethnographic approach allows an exploration of resistance, a concept that is also important in the processes around the competency-based curricular reform in Mexico. After Foucault, Ball believes critical ethnography is able to capture “local, discontinuous, disqualified, illegitimate knowledge against the claims of a unitary body of theory that would filter, hierarchise, and order them in the name of true knowledge” (Foucault, 1980, p. 83 in Ball, 1994). Critical ethnographic design has allowed me to access the voices of those education actors who experienced that their interpretations of the curricular reform had been excluded, such as the dissident teachers’ union CNTE and groups of teachers.

Conceiving the policy process as processes of contesting knowledge or discourses also problematises a conceptualisation of resistance to education policy simply as “resistance to change” of teachers (cf. Tatto, Schmelkes, Guevara, & Tapia, 2006), which does not “give voice” (Ball 1994, p. 4) to other motives actors might have to resist official education policy. Meta-institutional categories such as ‘state’ or ‘teachers’ union’ do not suffice to understand how things operate; there is a much more complex array of actors, opinion and practices within each of these categories.

At the same time, critical policy ethnography acknowledges that policy is not exempt from the multi-scalar social and power dynamics that are at play within a globalising society (Armitage, 2008 in Ojha et al., 2015, p. 390), which allowed me explore how local enactments were embedded and had to respond to forces and actors operating at the higher scales (e.g. the Mexican state or national scales). Critical policy ethnography is also concerned with mapping the

context of influence over policy issues and locating dominant waves of discourses affecting the policy processes (Ojha, 2013 in Ojha et al., 2015, p. 390), which fitted with the policy trajectory approach.

The approach in this thesis is close to what Marcus calls 'multi-site ethnography' (1995 in Hamilton, 2011, p. 58), which links data across different geographical spaces and times rather than focussing on a bounded local context as anthropologists have traditionally done. In addition to being multi-site, the research can also be characterised as a *multi-scale* ethnographic design (see Sub-section 1.2.5 for a discussion of the idea of scales). Empirical material for the policy analysis were collected through ethnographic methods - (group)interviews with participants, observational records, collections of documents -, which I describe in Section 2.4. The interpretation of these materials was guided by the theoretical orientation of a policy trajectory approach, following the trajectories of the interpretations of policy texts in the three contexts of influence, text writing and practices, across and between different scales, and identifying arenas of conflict in these trajectories.

The fieldwork for this thesis was carried out from July 2012 until July 2013.

2.3 The research sites

2.3.1 Selection of research sites

The different research sites were selected to reflect different historical, political, economic, education contexts, and rural/urban/indigenous schools.

I had originally set out to focus my study on the state of Michoacan, which had resisted the ACE and where I already had well established contacts. However, because I was interested in the contextualisation in different contexts I also wanted to include a political/educational context that was different to Michoacan. In addition, I realised from a conversation with an education policy researcher from the Ibero-American University at the national scale that conducting a study on those "lazy troublemakers in the south, whose resistance

is just about critiquing" (I-NA11) and calling it a study of re-contextualisation might lead to partial insights. Therefore, two months into the fieldwork, I included the state of Durango. The selection of this state was done on several grounds. Firstly, the state is part of what is referred to as the north of Mexico, which is historically, culturally and politically different from the south (as I show shortly). Secondly, I had already well established contacts in Durango based on prior research. I decided to expand the geographical focus of the research on the basis of these prior contacts rather than, for example, performance on national tests because it takes a long time to build relations of trust and get a general understanding of the education politics of Mexican states.

The selection of two different states fitted my objective of looking at different contexts. The inclusion of two study sites allowed me to compare the interesting dynamics in the politics of adaptation and change in different institutional contexts. Also, the economic situation, the presence of indigenous peoples, geographical area and performance on national tests differs in these two states. Tracing the trajectories of the competency-based education reform in two different political and material contexts allowed me to explore how and why different actors interpreted the reform differently. This made for a more interesting exploration of the ideas of translation, contextualisation and contestation, and the elements that played a role. For example, in the Michoacan context, which was seen as resisting national education reforms (in media and academic research), teachers actually worked with elements of the competency-reform. This suggests that classic binaries were less helpful in understanding what actually went on in Mexican policy processes.

2.3.2 Description of research sites

I investigated the translations and contestations of the competency reform in the different contexts of the states of Michoacan and Durango, at both the scale of the state and school. The main idea in this thesis is that the competency policy, as temporarily settled in the curricular texts of the reform to primary education

curriculum, is transformed, contested, resisted, by different education actors. This different contextualisation can be explained by the different historical, socio-economical and education political contexts in which these actors operate. In other words, the trajectories the competency reform took, were inherently related to and shaped by realities at the sub-national scales.

In this section, I briefly describe the contextual realities of Michoacan and Durango. I argue that while the states show *socio-economic* similarities, the political context of education is different. First, I briefly describe the socio-economic situation and political context of education at the Michoacan state scale (I elaborate on this extensively in Sub-section 6.1.1). Then, I briefly describe the Michoacan schools (I elaborate on this in Chapter 7, and I provide a detailed description of the socio-economic situation of the Michoacan municipalities in Appendix 2). Subsequently, I briefly describe the socio-economic situation and political context of education at the Durango state scale (I elaborate on this extensively in Sub-section 6.1.2). Then, I describe the Durango schools (I elaborate on this in Chapter 7, and I provide a detailed description of the socio-economic situation of the Durango municipalities in Appendix 3).

State scale - Michoacan

Socio-economic context

The state of Michoacan is located in the centre-west part of Mexico (see Figure 1).

Figure 1: Map of the states of Michoacan and Durango (state scale)



Source: Own elaboration using Arcmap

Michoacan's Capital City is Morelia. The relative small state comprehends three per cent of the entire Mexican territory (INEGI, 2011). Michoacan's inhabitants represent 3.9 per cent of the total Mexican population, and around seventy per cent live in urban areas (INEGI, 2011). In 2012, many households had access to electricity, but very few had access to the Internet. Although few people had computers or telephones, more than half of the Michoacanos owed a cell phone (INEGI, 2014).

According to the National Evaluation Council for Social Development Policy (CONEVAL), in 2010, Michoacan was among the top ten poorest Mexican states in the country. More than half of its population was unable to satisfy their basic

needs. 13.5 per cent of Michoacán's population lived in extreme poverty, that is, they were unable to satisfy three or more basic needs and/or a basic food basket.

In 2012, its GDP formed 2.33 per cent (INEGI, 2014). The latest Human Development Report (2007) emphasised the socio-economic diversity of Michoacán. The state ranked 28th on the national human development index, which means it fell below the Latin American and Caribbean average. Most municipalities fell in the medium human development category. No municipalities fell in the lowest category. Inequality within the state is similar to inequality in the country as a whole, but there were significant differences within municipalities (UNDP, 2007). Michoacán is culturally diverse. Three per cent of the state population spoke an indigenous language in 2010 (INEGI, 2011).

Political context to education

Michoacán was governed from 2002 until 2012 by the left of centre PRD. The 2012 elections were won by the right of centre PRI. The dissident teachers' union CNTE has dominated the union congress in Michoacán since the 1980s, which provided them with political power over the Michoacán education policy making process. (I describe the political context and complex configuration of education actors at the state level in more detail in Sub-section 6.1.1.)

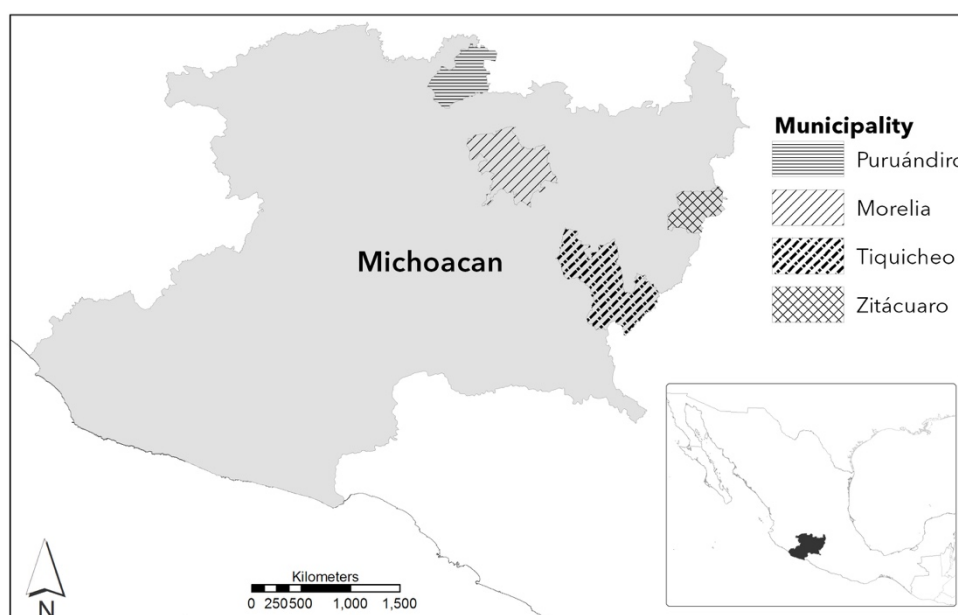
With regard to education, in 2012-2013, the average schooling in Michoacán was 7.6 years, which was below the national average of 8.9. The illiteracy rate stood at 9.3 per cent, which is higher than the national rate of 6.1 per cent. In the 2007 human development report it is argued that "the main issues with education in Michoacán originate in primary education" (UNDP, 2007, p. 4). The most serious education setbacks are faced in rural and indigenous areas and, more generally, we can say that the dispersion and geographical barriers hinder access of children and youth to education services, especially in locations furthest away from municipal and urban centres (PED 2008-2012:75).

Michoacan - School scale

The school research in Michoacan was conducted in six different schools within the state. Because there was no information available for all the different villages or localities in which the schools are located, and moreover a description of the village scale would evidence which schools I visited (as in some villages there is only one primary school), I present the information at municipality scale.

The different schools are located in the different municipalities of Morelia, Tiquicheo de Nicolás Romero (or Tiquicheo), Zitácuaro, and Puruándiro (see Figure 2). These different schools were selected because they were located in and reflected different rural and urban contexts.²⁴ In total, two urban schools, one rural school, one rural bilingual school and two rural 'holistic' schools were selected. (See Appendix 2 for a description of the field sites in Michoacan.)

Figure 2: Map of the municipalities of Morelia, Tiquicheo, Zitácuaro, and Puruándiro in the state of Michoacan (school scale)



Source: Own elaboration using Arcmap

²⁴ Schools were classified as urban or rural according to the classification used on: <http://www.microrregiones.gob.mx/>

Durango - state scale

Socio-economic context

Durango in the north is the fourth biggest state of Mexico in terms of territory (6.4% of the national continental surface) (see Figure 1).

However, its inhabitants only make up one and a half per cent of the total Mexican population. Durango is located in the centre-west of the Mexican high plateau and it is cross-cut by two mountain systems: The Sierra Madre Oriental and the Sierra Madre Occidental, which make it a state that is difficult to access to some areas. Around seventy per cent of the people live in urban areas, similarly to Michoacan. Around 4000 of Durango's 5000 rural communities have less than 100 inhabitants, which means that many of the schools in these areas are multi-year schools (INEGI, 2011).

In 2012, the state GDP made up 1.23 per cent of the national total (INEGI, 2014). In 2010, half of the population lived in poverty, of which ten per cent lived in extreme poverty. This means that one out of every ten people did not have enough income to satisfy at least three basic needs (CONEVAL, 2012). Two % of Durango's population is indigenous (INEGI, 2011). This socio-economic situation is similar to the situation in Michoacan.

Political context to education

Durango has historically been governed by the right of centre PRI, and the teacher' union SNTE has dominated local union congress. The state has generally been supportive of education policies emanating from the national scale. The political situation in Durango, which I will describe in more detail in Sub-section 6.1.2, is vastly different from that in Michoacan.

With regard to education, the average years of schooling was 8.8, which is 0.1 year below the national average of 8.9. Illiteracy is low at 3.1 per cent, compared to the national total of 6.1%. Eighty per cent of schools are multi-year, which

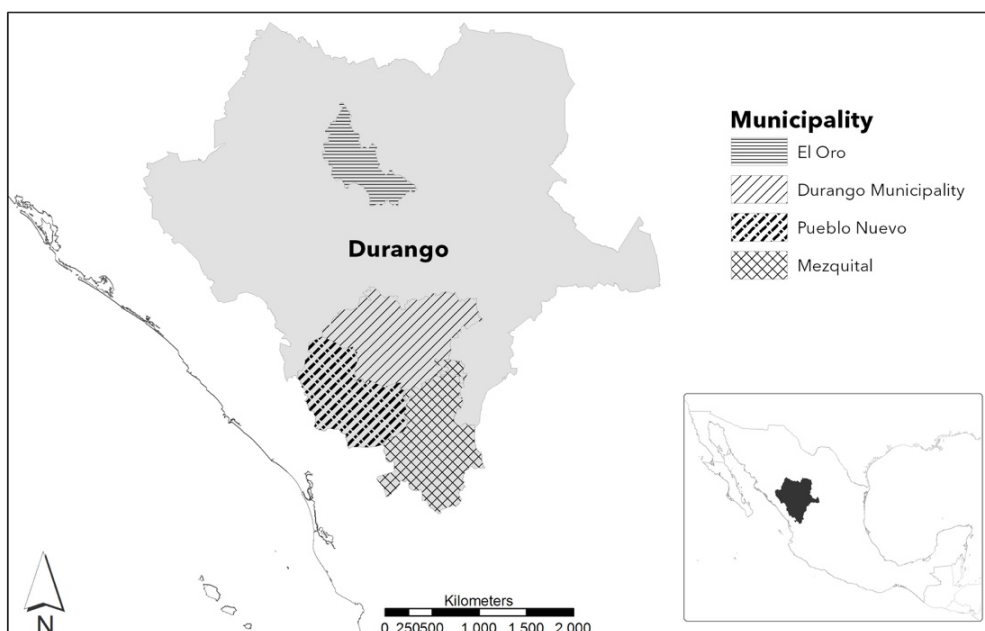
means that one or more teachers serve several years in one classroom. A quarter of schools in Durango have been reported to be in terrible state (INIFED, 2010).

Durango - School scale

The school scale research in Durango was conducted in twelve different schools within the state. As in the case of Michoacan, because there was no information available for all the different villages or localities in which the schools are located, and moreover a description of the village scale would evidence which schools I visited (as in some villages there is only one primary school), I present the information at municipality scale.

The different schools are located in the different municipalities of Durango, El Oro, Mezquital, and Pueblo Nuevo (see Figure 3). These different schools were selected because they are located in different rural and urban contexts. In total, 2 urban schools, one urban COCOPO school, eight rural schools and one rural bilingual school were selected (See Appendix 3 for a description of the Durango school contexts.)

Figure 3: Map of the municipalities of El Oro, Durango, Pueblo Nuevo, and Mezquital in the state of Durango (school scale)



Source: Own elaboration using Arcmap

2.3.3 Selection of gatekeepers and research participants

The aim of the selection of research participants was to create a selection that would give an idea how the different groups that interpreted and enacted the competency reform at the different scales and contexts. On the basis of theoretical sampling, I had distinguished several main groups that were important in Mexican education policy processes. For example, in his study of the implementation of an education reform in Mexico, Flores Crespo (2012) selects his 'key informants' on the basis of purposive sampling, and he considers important groups of actors to be: Central authorities (Ministry of Basic Education); state authorities (state Ministry of Education); journalists; teachers' union leaders and members; teachers (both SNTE and dissident union CNTE); and non-governmental organisations. The Mexican MoE states that the curriculum was revised by the following groups: teachers' unions; academic organisations; civil society organisations (SEP, 2011a).

On the basis of prior research in Mexico, I had already established contact with gatekeepers as well as with important education actors in the reform, which affected the initial selection of respondents for this research. At the national scale, I knew education policy researchers from the National Autonomous University of Mexico²⁵ (UNAM) and the Ibero-American University²⁶, who were able to connect me to national education actors that had played a role in the curricular reform. In Michoacan, my gatekeepers were two senior MoE officials, who were well connected with both the institutional and dissident teachers' union. This provided me with initial access to the highly complex political arena. In Durango, my gatekeepers were a well-connected senior MoE official, and a secondary teacher. Moreover, the leadership of the dissident teachers' union CNTE in Michoacan had provided me with access to the dissident union

²⁵ *Universidad Nacional Autónoma de México.*

²⁶ *Universidad Iberoamericana.*

COCOPO in Durango. In general, these gatekeepers provided access to both the senior MoE levels and their more positive perspectives and interpretations of competency discourses, as well as other education actors and available critical discourses of competencies.

In addition to the access to participants provided by these gatekeepers, once in the field, I continued to construct my idea about important people in the reform by employing the snowball technique. In my selection, I tried to include participants of these organisations, in order to understand their understandings of competency education, as well as their claims to participation. At the same time, the aim of the selection was to include participants whose voices, in their own words, were *excluded* from the policy processes. Participants for this study were selected for interviews by non-probability sampling techniques, or purposive sampling (May, 1993; Hornby and Symon, 1994; Miles and Huberman, 1994 in Vidovich 2003), on the basis that this study called for "specific information from specific informants who are knowledgeable about the process under consideration" (Hornby and Symon, 1994, p. 169 in Vidovich 2003). Also, in the literature, this method is described as useful when studying sensitive issues (Boeije, 2010), such as politics.

In practice, the snowball technique entailed asking the gatekeepers who I established contact with for an initial number of potential participants, and subsequently asking these participants for other people I should talk to on the basis of whether they thought they were knowledgeable about the processes regarding the curricular reform. In all cases, I accessed the participant on the basis of a referral. For example, the contact with the coordinator of the competency-based curricular reform at the national scale, was established on the basis of a referral by a researcher friend we have in common. In another example, the access to training sessions for MoE officials in the states, my access would be provided through the state coordinators of the reform (CEAS), who would introduce me at such events. I would state my name, institutional affiliation, and explain my interest in learning about the processes around the competency-based curricular in Mexico. To many sites at the school scale I

gained access through invitation. Teachers I would meet at state events or training sessions would invite me to visit and research their schools.

Through the process described above, I ended up with the following selection of participants at the different scales and sites: At the international scale, two participants from UNESCO Mexico, and one from the OECD who had been involved in the OECD-Mexican Education quality project were selected.

At the national scale, I selected participants from the MoE (senior officials from the Department of Curricular Development, Department of Teacher Professional Development²⁷, Department of Educational Materials, and the Department of Indigenous Education) who had been part of the team in charge of the curricular reform, the teachers' union (SNTE), the Institute of Research about the University and Education (IISUE) of the Mexican National Autonomous University (UNAM), the National Institute for Educational Evaluation (INEE), and the national newspaper *la Jornada*. The participants at this scale were geographically located in Mexico City.

At the state scale, in both Michoacan and Durango, I selected participants from the MoE, both senior and junior officials, such as education ministers, sub-secretaries of basic education, department directors, State Coordination of Advice and Follow-up²⁸ (CEAS), academic advisors to MoE, supervisors, Pedagogical Technical Advisors²⁹ (ATPs). I also interviewed the leadership of the state sections of the teachers' union SNTE, as well as the dissident teachers' union CNTE.

In addition, in Michoacan two education civil society organisations related to education: *Mexicanos Primero* and State Network for Educational

²⁷ The full name of this department is the Department of Continuous Education and Professional Development of Basic Education Teachers.

²⁸ *Coordinación Estatal de Asesoría y Seguimiento*. State MoE in charge of implementing the reform.

²⁹ *Asesor Técnico Pedagógico*.

Transformation³⁰ (RETE). Researchers from the National Pedagogical University³¹ (UPN), and the State Technical Education Council³² (CETE) that was in charge of reviewing education reforms that come from the central government. In Durango, participants from parents' organisation; directors of the teachers' centre (*centros de maestros*); and the leadership of the social teachers' movement the Popular Worker Coordination Council³³ (COCOPO) were selected.

At the school scale, in Michoacan and Durango, I spoke to teachers and school directors in seventeen different schools. These reflected both urban, rural, bilingual, and CNTE/COCOPO schools.

2.4 Research methods

2.4.1 Documentary research

In order to understand how competencies temporarily settled in the curricular texts, into different competency discourses that draw on different imaginaries, I relied on document research. Similar to Vidovich (2003), I employed a form of textual analysis that teases out the competing and contradictory competency discourses in the texts. The analysis was not intended as a fine-grained discourse analysis but had the intention of revealing the struggle over the production and the resultant internal contradictions in the policy texts, as well as deepening the understanding of the different available interpretations of competency-based education in the processes around the reform.

I collected several types of documentary sources. First, I used the curricular texts of the competency-based reform. From 2007 until 2011, the curricular texts

³⁰ *Red Estatal para la Transformación Educativa.*

³¹ *Universidad Pedagógica Nacional.*

³² *Consejo Estatal Técnico de la Educación.*

³³ *Consejo Coordinador Obrero Popular.*

went through a process of writing and rewriting, and piloting and implementation. In 2007, the first drafts of the curriculum were written. During 2008-2009 the pilot of the curriculum was applied in years 1, 2, 5 and 6 of 4.723 schools in the different Mexican states. In 2009-2010, the revised version was applied in years 1, 2, 5 and 6. Also, the programmes for years 3, and 4 were piloted. In 2010, a revised version of the 2009 curriculum was published, which stated to have incorporated information obtained during the pilot phase. In 2011 the last textual version of the competency-based curricular reform to primary education was published. The reform processes are summarised in Table 2 below.

Table 2: Development of the 2009-2011 competency-based curricular reform to primary education in the Mexican states from 2008-2013.

School year	Pilot curriculum 2009 in 5.000 schools	Implementation curriculum 2009 in all schools	Implementation curriculum 2011
2008-2009	Year 1, 2, 5 and 6		
2009-2010	Year 2, 3, 4 and 5	Year 1 and 6	
2010-2011	Year 3 and 4	Year 2 and 5	
2011-2012			All years
2012-2013			All years

Source: SEP (2011b)

The processes in the context of text writing of the curricular reform to primary education were highly complex as many different documents have been written by many different people and institutions in many places and at different times. For example, the Mexican MoE produced teachers' manuals and textbooks. However, the *planes de studio* describe the central elements of the curriculum, such as the competencies for life. The *programas de estudio* describes the organisation of the subjects, the aims, the approaches, the expected learning outcomes, and didactical suggestions. The *planes* and *programas de estudios* are in Mexico often referred to as the curriculum (Arnout 2010: 36). Therefore, the first part of the document analysis focussed on these *planes y programas*. To further narrow down the amount of texts, the analysis focussed on the first 2008-

2009 pilot of the curricular reform³⁴, and the 2011 final texts³⁵. From here on, I refer to these texts as Curriculum 2009 and Curriculum 2011. The result of the policy document analysis is reported in Chapter 4.

In addition to the policy texts of the competency-based reform to primary education, I also researched the curricular texts from the reforms to preschool and secondary education (that is, the *planes y programas*), which added to information about the origins of specific Mexican competency discourses. The result of this policy document analysis is reported in Chapter 3.

In addition to the policy documents, I also collected pamphlets and information leaflets of the different teachers' unions (CNTE, SNTE), and civil society groups (RETEM, CETE, *Mexicanos Primero*) and journal articles written in *la Jornada* and *el Proceso* of academics and intellectuals who were affiliated to the dissident teachers' union CNTE. These documents enriched the insights and understanding of the opinions, interpretations, and critiques of competency-based education, and the broader socio-economic imaginaries, of education actors in the processes around the reform. In Sub-section 2.4.6, I elaborate on the method of analysis of these document.

2.4.2 Semi-structured in-depth interviewing

I employed interviewing as a method because I was interested in understanding the experiences and perceptions of actors that participated in the curricular reform, and how participants came to attach certain meanings to phenomena or events in the reform (Taylor & Bogdan 1998, 98 in Berg, 2001, 72). The semi-

³⁴ SEP (2008) *Educación Básica. Primaria. Plan de estudios 2009. Etapa de prueba. Primera Edición*. SEP, Mexico. ISBN 978-970-829-013-5, and: SEP (2008) *Educación básica. Primaria. Programas de estudio 2009 y guías de actividades. Primer Grado. Etapa De Prueba*. Primera Edición, 2008. SEP, Mexico. ISBN 978-970-829-014-2.

³⁵ These are the documents: SEP (2011) *Plan de estudios 2011. Educación Básica. Primera Edición, 2011*. SEP, Mexico. ISBN: 978-607-467-081-3, and: SEP (2012) *Programas de estudio 2011. Guía para el Maestro. Educación Básica. Primaria. Primer grado. Primera Edición, 2012*. SEP, Mexico. ISBN: 978-607-467-190-2.

structured approach of the interviews on the one hand maintained control over of the kind of questions asked to ensure that they all covered similar issues to allow for comparisons and contrasts both within and between different scales of the trajectory. On the other hand, it was important to have the flexibility to use probes to elicit more detailed responses and also possibly to alter the sequence or combination of topics. I prepared interview guides in advance, which initially centred on participants' conceptualisations of the Mexican education policy process, their experiences of the competency-based reform, significant events in the reform, challenges or successes, and their ideas about quality education. Within those broad topics the participants were able to lead the discussion to aspects of the reform they felt comfortable talking about. The flexible approach allowed me to focus later in the research on the specific topics that were significant to people, such as; their perceived (non)participation, actors' different imaginaries about competency-education, development and Mexico, and the particular ways of working with the reform in teachers' classrooms.

All the interviews focussed on the experiences of the respondents within the processes surrounding the curricular reform, and their discourses of competency-based education and imaginaries. I structured the interviews according to the contexts of the policy trajectory study (that is, the contexts of influence, text-writing, and practice, *not* the material/political contexts). I asked all the respondents for their perceptions of the origins and the context leading to the initiation of the competency-reform processes in primary education, as well as the actors and discourses they perceived having played a role. The interviews also focussed on the processes of text-writing during 2007-2012, their roles, and the participatory nature of it. Similarly, all the interviews focussed on actors' experiences of the context of practice.

An issue that arose out of the reflexive analysis of the preliminary data has to do with interview questions. In general, I found that senior officials within the MoE at the national scale, who had sparse time, responded better to more structured interview questions. In contrast, for MoE officials at the state scale, structured and direct questions about the competency-based reform did not provoke

direct answers. In general, the respondents would guide the interviews to what they felt was wrong with Mexican education and the Mexican policy process, and whose fault they believed this was. At first, I felt this might have to do with the fact that they are political actors, who are used to appropriating the discursive space and guiding the interview to comfortable topics.

Later on in the research, I perceived that the guiding of the interview was about 'testing me out' politically, and the establishment of rapport. Therefore, after the first three interviews with the state scale actors, I started to give much more room to respondents to guide the interview, which considerably eased the conversation, and led to more interesting insights. With teachers, I conducted the least structured interviews. I felt that direct questions generated the feeling of being tested on knowledge of the competency-based curricular reform, and did not facilitate rapport and understanding.

In total, I conducted 114 one-to-one interviews (see Appendix 1 for an overview of the (group)interviews), which I taped on an MP3 voice recorder and an iPhone.

2.4.3 Group interviewing

After the idea arose that different groups could be distinguished based on the ways they described and interpreted the competency-based curricular reform, I started to conduct group interviews. The group interview is a qualitative data gathering technique that relies upon the systematic questioning of several participants (Denzin & Lincoln 2003: 70-71). This method provided me with an opportunity to understand "a specific event or experience shared by members of a group" (Denzin & Lincoln 2003, 71-73), in this case, their experiences and interpretations of the curricular reform. In contrast to the one-to-one interviews, I employed group interviews to triangulate the patterns I detected on the basis of the one-to-one interviews.

While the group interviews provided me with an idea of shared understandings or critiques of the reform, as well as patterns in socio-economic imaginaries that informed their ideas, there was a problem of within group power dynamics which undoubtedly has led some actors to better voice their opinion over others. I used one-to-one and group interviews iteratively throughout the research, in order to illuminate both shared understandings and differences.

In total, I conducted eight group interviews: one with a group of national MoE personnel from the Department of Educational Materials; one with three state scale MoE personnel in Durango; one with five people of the bipartite MoE/CNTE organisation in Michoacan; one with five MoE personnel during a reform course in Durango; one with staff from a teacher training institute in Durango; two with two researchers; one with ten students of the National Pedagogical University (UPN) of Michoacan; and one with five teachers of a 'holistic' school in Michoacan. In all the cases, the group interviews were pre-set, but in a familiar setting for the respondents. For example, in the case of teacher training students, the interviews took place in their classroom, as suggested by them. (See Appendix 1 for an overview of the (group) interviews).

I taped the group interviews on an MP3 voice recorder and a smart phone.

2.4.4 Participant observing and listening

Living in the different research sites in Mexico City, Michoacan and Durango for a total of twelve months, I was continuously engaged in participant observation, listening, informal conversation and unstructured interviewing about the competency-based curricular reform processes. I had general topics in mind that I wished to know about, such as the politics of processes related to the curricular reform, the understandings and opinions of actors about competencies, their ideas about competencies and education in general, their ideas about their participation in the reform processes. But I hoped that the unstructured open-ended nature of conversations would lead participants to

talk about aspects of the reform they thought most important, hoping to reduce as such imposing my “a priori categorisations” (Denzin & Lincoln 2003: 75). The observation of everyday relationships in context aimed to provide a detailed understanding of the complexities of on-going social processes, and the configuration of multiple actors, opinions and interests.

This method led me to observe and interact with research participants in a number of settings. I spent a minimum of four days in the classrooms with the different teachers in this research. I spent a minimum of a week in the communities where the schools were located. I also observed teacher training sessions; CEAS reunions; CNTE protests in Michoacan and Durango; RETE discussion groups about competency-based education; MoE conferences about the reform in Durango; CNTE conference in Michoacan about competency education (see Image 1); and COCOPO reunions. Spending this much time with people in processes surrounding the contextualisation around the reform provided me with an in-depth understanding of the different points of views, challenges, positionalities and discourses.

Image 1: Speaking during Curso-Taller Regional Del Educador Popular. Morelia, Michoacan. 17 July 2012



Source: Photograph taken by Fernando Hernández Espino

Note on doing research in a different language

I conducted (group)interviews in Spanish. The indigenous respondents were all fluent in Spanish. I perceived a surprise from participants regarding my fluency in Spanish and in many cases this led to an interest in talking to me, which eased access. However, because my mother-tongue is Dutch, I must have missed out on subtle messages in speech, which without a doubt must have affected my understanding and representation of the politics of the re-contextualisation of the competency-based reform.

2.4.5 Positionality and co-construction of data

Rather than neutral tools for data collection, research methods are interactions between people leading to negotiated, contextually based representations, which are more over interlaced by power relations (Denzin & Lincoln, 2008). From the moment I decided on an initial research topic until the writing of the last word of this thesis, I have played a role in the construction of the story of the re-contextualisation of the curricular reform, in several ways.

As soon as I entered the highly politicised field of Mexican education policy, I became part of this matrix. My personal politics are founded upon socialist socio-economic imaginaries (against privatization of education, investing in education, progressive redistributive tax systems etcetera). This led to an initial bias towards gatekeepers that held similar ideological ideas as mine. I address this bias by adding the state of Durango and expanding the selection of participants beyond those who were critical of the reform.

In addition, one of the most challenging things during this research was to conceptualise myself in all the different situations and contexts, and to all the different participants (Denzin & Lincoln, 2008, p. 131). At the beginning of this research, I tried to remain an 'outsider' by presenting myself as a researcher or learner, and not sharing information related to my personal political opinions. Some months into the research, I stopped presenting myself as being affiliated

to the University of Michoacan, because I realised that this university had a powerful image of subversivity at the national scale, which did not ease access to senior MoE officials. However, at the onset of the research, I realised that not only was 'neutrality' difficult to maintain in a highly politicised context, my lack of confirmation that I sympathised with socialist politics complicated access to some within the dissident teachers' union CNTE. My post-structuralist stances to research, and wish to capture different views on competency policy also created tensions within the highly politicised context of Mexican education policy making. For some, for example within the dissident teachers' union CNTE, postmodern complexity theories were associated with pluralism and neoliberalism. For them, it would be suspicious that I was interviewing the opposite group. From prior research in Mexico I knew that association or identification with certain political groups or opinions could either facilitate or obstruct contact and the sharing of information by participants.

Another time, not unlike Johnson's (1976 in Denzin & Lincoln 2003, 77) experience of studying a welfare office when he was perceived as a "spy for management", at a CNTE event, I heard some *compañeros* discussing that they thought I was from the OECD, trying to steal their alternative education proposal. At the time of research, within the CNTE the story circulated that a policy idea was stolen by a national Mexican education minister. For the CNTE, this was perceived as problematic because it was taken out of its proposed socialist education context and discourse, and reinterpreted within the neoliberal context as a state policy. However, when I asked a senior state MoE official about the policy, she pointed out that this proposal was part of an alternative education project³⁶ which was formulated in 1995, developed by education actors who were critical of union activism and wanted to focus on education proposals rather than politics. After a while, different education actors within Michoacan politics, coming from different ideological positions, had started to claim the origins of the education proposal. I used this information as

³⁶ Namely the *Proyecto de Educación y Cultura*.

data, which I fed back into the idea about the struggle over education between different education groups, the changing nature of policies, and the importance of placing terms and education policy ideas within wider imaginaries or discourses.

My white European female status has also affected the access and generation of data. The high status of whiteness that is prevalent in parts of Mexico eased my access to senior officials, as well as most teachers. At times I felt that the knowledge that I was from abroad made education actors expound their negative views and opinions about Mexican policy making processes even more strongly. In these cases, I perceived that my foreignness, and the higher status that was associated with it, motivated education actors to perceive me as a possible ally, propelling them to share their experiences openly. However, my foreignness initially complicated access to the more radical actors within the dissident teachers' union CNTE, as for them foreignness was associated negatively.

2.4.6 Data analysis

The interpretation of the empirical material (policy texts, newspaper articles, field notes, (group)interview transcripts) was guided by the theoretical orientation of policy trajectories, following the trajectories of competencies as floating signifiers at the different scales of government, where particular competency discourses are (temporarily) fixed in the texts, and the idea of enactment.

The data analysis in this research combined informal interpretative work with more formal qualitative coding. The informal data construction phase of this research started from the moment I chose the topic of research. The initial data construction took the form of more interpretative and informal work. On the basis of the field notes, I would start to reflect on events during the days, and to distinguish patterns. For example, in conversations, people started to refer to

others in the reform as having faulty interpretations of the reform. This reinforced the initial idea I had developed on the basis of theoretical sampling, that in the processes around the education reform, different groups participated, and that these different groups could be distinguished on the basis of their different understandings of the competency reform. It also provided me with information about how the groups were constituted, for example through the references participants made to themselves as 'us' and to actors with divergent meanings as 'them'. These initial observations, I would translate to my interview guide, which I would restructure to make sure that it included questions about other actors in the reform. This served not only to understand actors' own ideas and understandings of the competency-based curriculum, but also provided me with an idea of how and on which points these differed from others.

Another example is the emergence of the theme of social imagination from the interpretive work. Early in my research, I realised that respondents used terms such as 'social imaginations', or 'ideas', to refer to what they judged as others' 'faulty' understandings of competency-based education in the curricular reform. For example, one senior official in the MoE in Durango commented that,

[p]eople think that if Mexico does not follow their recommendations, there will not be resources. But the OECD or UNESCO does not have resources, that's the World Bank or the International Monetary Fund. But this idea has stuck in the social imaginary, this idea that we want to align with them so they give us money. It is likely that the World Bank has some requirements for policies. But assuming that this is true, it is not bad if we advance. I trust the government (I-ST11).

That same senior MoE official commented when reflecting on the actions of the social movement Popular Worker Coordination Council³⁷ COCOPO that,

I would like to conduct similar research like you in order to understand how they see it, what meaning it has for them, whether they are

³⁷ *Consejo Coordinador Obrero Popular.*

convinced of what they do, or whether they are aware that they use their protests for other purposes (I-ST11).

These comments developed into the idea that during the processes around the curricular reform different actors made claims to the status of their understandings of competencies as 'truth', whereas they refer to the interpretations of others as 'ideologies', 'uninformed'/'misinformed' or 'biased opinions'. Thus, an important theme that arose from the field work is that during the re-contextualisation of CBE, different groups of actors claimed that the interpretations and enactments of other groups were faulty or based on misinformation, which was often provided by leaders (key policy interpreters) who consciously wanted to misguide others for political reasons. A quote from a researcher at the UNESCO Mexico office illustrates this: "Those poor [teachers] in Michoacan and Oaxaca, they are the most manipulated" (I-IN1). Similarly, senior policy makers often claimed that teachers had not really understood the term competencies, and they talked about resistance to the approach as being based on wrong or mis-information.

I also conducted more systematic qualitative thematic analysis. From the beginning of the research, I transcribed the recorded (group)interviews. On the basis of the first ten transcriptions, I developed an initial list of themes, which were related to: the role of participants in the reform; their (perceived) participation in the reform; origins of the reform; meaning of competencies; wider discourse about competency education, Mexico, and development; problems with the reform; policy ensembles interacting with the reform; political and material contexts interacting with reform; relevance of the reform; problems with Mexican education in general; alternatives to competency education; and the enactments or contestation of reform processes.

On the basis of this process, a few weeks into my research, I had developed an initial set of themes and topics I was interested in, which I fed back into a semi-structured interview guide, which I systematically covered with the different respondents throughout the fieldwork. Once I transcribed all the interviews, I inserted them into the qualitative analysis software NVivo, which helped me to

systematically search the sources and assign 'nodes' (themes). I treated the other documentary sources (for example, information handed out during dissident teachers' union CNTE education conferences) in the same way. A node is a collection of references about a specific theme, place, person or area of interest. I complemented the (group)interview data about meaning-making, discourses, imaginaries and enactment with the information from observations and document research. For example, when researching the sources, I coded content related to 'opinions about actors' participation in the curricular reform' at the node 'perceptions of participation', which provided me with information about what education actors perceived participation to be, or how they had experienced their participation in shaping the reform.

In the data analysis I not just focussed on the product (the empirical material, that is the documents or texts), but also I also critically considered the political, social and economic context of production of the texts (May, 2011). For example, I reflected on the context that produced the interviews, the context in which CNTE information leaflets were produced and re-read, and the context in which the curricular documents were produced and re-read. As I was interested in the production and reception (or reading of texts), this approach provided me with insights into the conditions and decisions that informed their production, intended meanings, and the ways in which they were received.

2.5 Research ethics and limitations

This research was given ethical clearance by the International Research Ethics Committee, School of International Development, UEA. I followed the UEA Faculty of Social Science ethical policy.³⁸ In practice, this meant I considered potential risks to research participants. I obtained informed consent orally, and recorded only if agreed to by the participant. I elaborate on the issue of anonymity below.

³⁸ See <http://www.uea.ac.uk/ssf/ethics> for details.

2.5.1 Anonymity of research participants and confidentiality

My interests in political processes made disclosure a possible risk to participants. I dealt with this by taking field notes in Dutch. I also anonymised participants' names in my field- and research notes by crossing them with a black marker, after having transferred the information to my computer, which was protected with several passwords. This was essential because people sometimes wanted to read my field diary, to see, as they explained, what the Dutch language looked like.

To guarantee anonymity in the text, I mention only actors' affiliation to or position within an organisation, as well as the scale at which they were located (international, national, state, school). In Chapter 7, where I discuss the interpretations and enactments of the reform by teachers, I mention in which state the teacher was located and whether (s)he taught in a rural or urban school. Each interview was assigned a unique interview code (UIC), which is made up of the type of interview (individual - I or group interview - GI), scale at which the participant was located (IN, NA, ST, SC) and number (assigned chronologically). For example, an interview with a state official from the MoE in Durango, held on 12 February 2013, was assigned UIC I-ST60.

To further ensure anonymity, I provide the names of the municipality in which the schools were located, rather than the cities, villages or localities.

2.5.2 Limitations

There are limitations to this study on the complex and multiple processes of interpretation and enactments of the curricular reform, stemming from time constraints as well as choices made throughout the process. My attempt to achieve an understanding of the different ways in which the competency-based curricular reform re-contextualised throughout different contexts and scales has

resulted in a large number of interviews which provided a picture of political processes and patterns, and understanding of the links between the different scales of the policy trajectory. However, it became a study with a narrower focus for example on the myriad processes and ways in which competency-based education was enacted in and between all the different schools I researched. The study cannot be called an in-depth ethnography of competency practices.

Although I have incorporated indigenous/bilingual schools in this study, the number of schools was too small to draw any conclusions as to how the interpretations and enactments of the competency-based reform were shaped differently between indigenous and non-indigenous schools.

The focus is also on politics of policy and less on competency enactments within schools, which was also related to my lack of training as education ethnographer. Moreover, the voices of other relevant actors in and around the school, such as pupils and their communities (including parents), were also not in the analysis.

Another limitation is that I only researched two states in Mexico, due to limitations on time and resources. The findings therefore provide insights to the processes surrounding the competency-based curricular reform, but they cannot be necessarily generalised to the whole of Mexico as each state context is slightly different.

Chapter 3 The re-contextualisation of competency-based curricular reforms in Mexico 1980s-2000s

The adoption of competency-based approaches in the curricular reform to primary education cannot solely be explained by taking a single policy view. As I argue in subsequent chapters, part of the context of influence that has shaped the adoption, interpretation and enactment of the curricular reform in primary education was made up of the experiences with prior Mexican competency reforms, and the meaning that competencies acquired.

Therefore, in this chapter, I discuss the adoption and re-contextualisation of competency-based approaches to education in Mexican curricular reforms prior to the curricular reform to primary education, in order to understand the ways in which the meanings of the signifier competency have been constructed within specific Mexican historic and political projects. I discuss the changes in the competency-based reforms over time, by looking at the different governments that promoted them, the national and global imaginaries on which they drew, as well as the role of international actors.

In Section 3.1, I discuss the nature of the competency-based curricular reforms that were introduced to Mexican education in the 1990s. After that, in Section 3.2, I discuss the competency-based curricular reforms that were introduced in the 2000s. In both sections, I discuss how competency-based curricular reforms fitted within the economic and political projects of successive governments, as well as the role of global discourses and actors. Lastly, I draw some conclusions about the different ways in which competency approaches have been adopted and acquired meaning in Mexican curricular reforms in Section 3.3.

3.1 1990s: Educational modernisation

The introduction of competency-based approaches to education in Mexico fits within a broader political and economic modernisation project in the 1990s that was centred around global integration, liberalisation, privatisation, and

decentralisation, which I discussed in detail in Section 1.4. Within this imaginary of the global economy, competency approaches were perceived by the Mexican government and international education organisations that had presence in Mexico, to fit within these aims. In the 1980s and 1990s, countries worldwide sought ways to respond to global changes characterised by rapid growth in technology, international competitiveness and new trade agreements, developments that are sometimes described as the transition to the knowledge and information society (Kouwenhoven, 2003). In this context, an interest in education that focused on practical skills such as the capacity to innovate, adapt and learn and the training of future generations for the constantly changing production processes gained popularity (Argüelles, 2000). Governments increasingly sought to move from an emphasis on so-called 'input criteria' (the number of years spent in education) to 'process' and 'output/outcomes' approaches (Biemans et al., 2004). Competency approaches initially (re)appeared in the UK, EU, Australia, Canada, New Zealand, and were subsequently introduced in Asia and Latin America, mostly in vocational education and training (Argüelles, 2000, p. 10).

In Latin America, the OECD, the Economic Commission for Latin America and the Caribbean³⁹ (CEPAL), the Organisation of Ibero-American States (OEI), and the Latin American Development Bank (CAF) promoted a perspective to competencies which was dominantly informed by a human capital perspective. Deficient quality in education for these organisations was linked to the lack of capacity in the labour market, as "companies in the region face greater challenges than other regions in the world to find employees with the right competencies", which they argued affected the competitiveness of Latin American enterprises (OCDE, 2015).

³⁹ *Comisión Económica para América Latina y el Caribe.*

3.1.1 1994: Vocational education and training

In the context of Mexico's aim to integrate in the global market, vocational education and training (VET) was the first modality to undergo competency-based reforms. The competency reform to VET was given meaning within the goal of the training of human resources according to the need of labour market to increase the levels of productivity and competitiveness in order to better confront the global market and technological changes. In other words, "the motivations for the adoption of the competency approach were economic rather than educational" (Argüelles, 2000, p. 18).

The adoption of competency-based approaches suited the additional Mexican agenda to homogenise the approaches and modalities of upper secondary education on the basis of similar competency outcome standards (Argüelles, 2000). There was also a lack of relation between the Ministry of Education (MoE) and the Ministry of Labour and Social Welfare, which meant that diplomas and competencies acquired outside formal schooling were not recognised. A further rationale for the initiative was Mexico's membership of the OECD, and the need to develop objective measures to certify work experience (de Anda, 2011). These issues together sparked an interest in a competency-based reform of VET (de Anda, 2011, p. 8).

The main promoter of the introduction of the competency system was the national Mexican government, and, specifically, education minister Zedillo, whereas the participation of education and training institutions and employers was limited (Argüelles, 2000, p. 8). The Mexican government's aim was to develop a standardised system of labour competencies,⁴⁰ their certification, and a competency-based curriculum. International organisations were very much involved in the promotion of competency approaches in Mexico. In 1994, the Mexican government negotiated a loan from the World Bank and the Inter-

⁴⁰ *Competencias laborales.*

American Development Bank to develop and implement the reforms.⁴¹ The World Bank was interested in education reform, because it was their perspective that Mexico needed to increase its economic productivity by developing a more highly skilled workforce. It also recommended addressing weaknesses in the vocational and technical training system including: poor quality provision; the supply-driven and inflexible nature of the programmes in relation to the changing labour market needs; and the lack of an adequate institutional framework for private sector participation in the design and provision of training (The World Bank 1994, 5 in de Anda, 2011, p. 376).

The design of the qualification standards also drew on experiences from other countries. The Mexican Ministry of Labour and Social Welfare chose the UK's National Vocational Qualifications (NVQ) as it was considered closest to Mexico's purposes (2011, p. 9), despite warnings of researchers that this system could run into political and operational difficulties, against critiques about reductionism of the approach, and against the fact that the NVQs had been described as failed in the UK itself (Hyland, 1994, 2008). Nevertheless, a group of experts from the UK was contracted to develop the labour competency standards and certification system on the basis of the NVQs⁴² (de Anda, 2011, p. 375).

The programme did not reach its purposes. It experienced difficulties conceptualising academic subjects in terms of competencies (Argüelles and Gonczi 2000: 58-9). Educational institutions continued to design their own standards, and industry did not express much interest in the standards (de Anda, 2011, p. 380).

⁴¹ This project was called Technical Education and Training Modernisation Project (PMETyC).

⁴² The UK itself had imported competency-based education and training as a model for the NVQs from the USA (Hyland, 1994).

3.1.2 1993: *Primary and secondary education, and teacher education*

The curriculum of basic education was also reformed within the framework of Mexico's modernizing curricular policy. The National Agreement for the Modernisation of Basic Education (ANMEB) which was signed between the national government, the state governments, and the National Union of Education Workers (SNTE), stipulated curricular reforms of primary and secondary education. Although the approach was not specifically called 'competency-based',⁴³ it was established that basic education should develop the skills and basic competencies to continue learning. The new curriculum placed an emphasis on the subjects of Spanish and Mathematics. A series of transversal contents were also included, such as a focus on gender equality and human development. The need to unite the curriculums of preschool, primary and secondary education was established in order to consolidate basic education as one cycle (Arnaut & Giorguli, 2010).

The specification of the need for the development of basic competencies in the curriculum is a clear example of how the Mexican government drew on global ideas. Within international organisations the idea of basic learning needs was promoted. For example, UNESCO's world declaration on Education for All stipulated that the purpose of education should be to develop "both essential learning tools (such as literacy, oral expression, numeracy, and problem solving) and the basic learning content (such as knowledge, skills, values, and attitudes) required by human beings to be able to survive, to develop their full capacities, to live and work in dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions, and to continue learning" (UNESCO, 1990).

⁴³ *Enfoque centrado en competencias.*

3.2 Competencies in the 2000s

As I described in the introduction, in 2000, the political colour of the Mexican national government changed to the centre-right wing, PAN, after seventy-one years of rule of the Institutional Revolutionary Party PRI. The education policy package that the new government agreed with the SNTE (the Social Commitment for Quality Education), continued the pattern of improvement of the quality and equity of basic education designed in the 1990s, with the addition of the reform of institutional management (Ornelas, 2004). The policy package projected a utopian view of education in 2025 and the profile of a perfect teacher. It also showed international influences, especially those based on policy ideals such as Education for All and investment in basic education, promoted by UNESCO and the World Bank (UNESCO 1990; World Bank 1994). At the international scale, the idea of basic or key competencies was promoted by the OECD, EU and UNESCO, which denotes the competencies that all students should develop in order to participate successfully in school, work and life (Farstad, 2004). This idea was reflected in the Mexican policy package. In the curricular field, the need for competency-based curricular reforms of preschool and secondary education was raised, as I discuss below.

The effectiveness of the pact was limited due to, among other reasons, the lack of specific commitments and goals to be achieved by the system and by each of the actors involved. However, this social commitment placed some important issues on the political agenda that became major axes of the educational activities of the government, such as the establishment of the National Institute of Educational Evaluation and the entrance exams to the teaching profession and management positions of basic education (Arnaut & Giorguli, 2010, p. 44).

3.2.1 2002 *Preschool*

Preschool education,⁴⁴ which had become compulsory in 2002, was the first level of basic education to specifically adopt a competency-based curriculum. Under the PAN administration, “competencies were established as necessary to ensure students' high performance and their ability to answer to the demands of the information society, given that countries are subjected to a constant pressure to modernise and improve, in order to meet economic and social needs of their citizens, organisations and societies” (SEP 2002).

The curricular reform text was framed within discourses of human development and human rights, lifelong learning and learning-centred education, diversity, gender, quality and equity. In the text, competencies were defined as: “a set of capacities that include knowledge, attitudes, abilities and skills that a person achieved on the basis of a learning process and that are manifested in their performance in different situations and contexts” (SEP, 2004, p. 22). Competencies were specified, and grouped in six fields, related to: social and personal development; language and communication; mathematical thinking; exploration and knowledge of the world; artistic expression and appreciation; and physical development and health. The reform was framed within socio-constructivist learning theories; Teachers were expected to develop learning activities that were geared towards the development of the specified competencies taking into account students' acquired competencies, individual needs and contexts (SEP, 2004).

Arnaut and Giorguli (2010) argue that apart from some problems of a technical, logistical, financial and implementation nature, the reform of preschool posed no major academic, labour or political conflict. This was related to the preschool teachers' positive perception that competencies organised their work towards specific and clear goals. In terms of outcomes the competency reform was less

⁴⁴ *Preescolar*. For children aged 3-5.

successful; the contexts of the most vulnerable children, such as school conditions, infrastructure, and deficient or non-existent teacher training, affected the quality of their competency development.

3.2.2 2003 Vocational education and training

In 2003, the World Bank discontinued the funding for the competency reform programmes in VET.⁴⁵ However, the Inter-American Development Bank (IADB) funded another programme⁴⁶ to promote the articulation of upper medium education⁴⁷ with the economy. This was based on their belief in objective reference points against which to assess and certificate labour competencies.⁴⁸ The Bank argued that with better governance the programme would be successful (de Anda, 2011, p. 381). For the development of the programme, the IADB drew on experiences from Spain, France, the UK and the International Labour Organisation (ILO). With a competency-based approach to education, the IADB aimed at the:

- (i) modernisation of the social sectors...and poverty reduction; (ii) integration; (iii) modernisation of the state and sub-national decentralisation; and (iv) heightened competitiveness by lowering barriers that limit productivity (IADB 2004:3 in de Anda, 2011, p. 381).

The Bank expressed that “labour competence qualifications will enhance employability and these should be based on expressed requirements of the productive sectors” (de Anda, 2011). In this case, competency-based approaches in Mexico acquired meaning in connection to productive sectors and competitiveness.

⁴⁵ I have not been able to find information about the reasons for the discontinuation on the part of the WB.

⁴⁶ The Multiphase Skills-Based Human Resources Development Programme (ProFoRHCom).

⁴⁷ *Educación media superior.*

⁴⁸ *Competencias laborales.*

The IADB decided to continue with Phase II of the programme based on the good performance of education institutions, the competency-based Integral Reform of the Upper Medium Education that was being undertaken, the ongoing success of the OECD standardised test PISA, and the Mexican test ENLACE. The IADB was of the view that PISA and ENLACE provided third-party objective measures of differences amongst students and schools. However, the project also faced difficulties. Education institutions continued to develop their own standards and the poor industry participation remained. Also, formal academic qualifications retained their social currency over qualifications that indicated competencies and the competency-based courses were not well known among employers (de Anda, 2011, p. 383).

3.2.3 2005 Higher education

In the 2000s, within the context of global integration of markets and the challenges of the knowledge society, Mexican higher education was also subjected to competency-based reform efforts. Mexico participated since 2005 in the ALFA Tuning Latin America project which like the Tuning Educational Structures in European project, aimed to “tune” or integrate a higher education system on the basis of common competency standards and ideas of “quality, effectiveness and transparency”.⁴⁹

The professional competency model developed for higher education aimed to shift the focus from the possession to the use of knowledge. However, one of the main problems that designers of the curriculum in higher education faced was to move from the logic of labour competencies to the idea of academic competencies. Only some higher education institutions integrated elements of the professional competency system and they interpreted the model in diverse

⁴⁹ Information retrieved in December 2013 from <http://www.unideusto.org/tuningeu/home.html>

ways on the basis of different institutional needs, ideologies, interests and views (Diaz-Barriga & Barrón, 2014).

In addition, the system was perceived by teachers to be implemented in a vertical top-down way. They experienced a lack of information, training, infrastructure. In some cases, this generated resistance within universities and in many cases the way of working remained unchanged. The introduction of the competency model in universities attracted critique for being inspired by neoliberal, managerial and neo-behaviourist discourses (Diaz-Barriga & Barrón, 2014), leading to the commercialisation of higher education (Aboites, 2010).

3.2.4 2006 Secondary education

In the 2000s, secondary education became a priority for the Mexican administration. Despite having been declared mandatory since 1993, it had not received much attention from the government. Moreover, as the last cycle of basic education, it had become a highly relevant level to address important issues of educational equity and quality of Mexican adolescents (Arnaut & Giorguli, 2010, p. 45).

In 2006, the texts of the new curriculum of secondary education were published. The texts are framed by human development and human rights discourses, and the need to pay attention to lifelong learning, diversity, interculturality, gender and information and communication technology. An additional language in education is also emphasised. In the reform to secondary education, competencies were defined as that which

involves knowing to do (skill) with knowing (knowledge), as well as the assessment of the consequences of the impact of that doing (values and attitudes). In other words, the manifestation of a competency reveals the putting in practice of knowledge, skills, attitudes and values to achieve purposes in a given context (SEP, 2006, p. 11).

The renewed curriculum stipulated that in the current global context, the required education levels are increasingly higher in order to participate in

society and solve problems. In this context, basic education should contribute to the development of broad competencies that improve the way of living and living together in an increasingly complex society. In the Mexican curriculum, these were interpreted as five competencies for life, which are shown in Figure 4 below.

Figure 4: The five competencies for life of Mexican basic education



Source: Own elaboration on the basis of SEP (2006)

Another important element of the reform to secondary education was the competency-based graduate profile.⁵⁰ This profile outlined the individual traits that Mexican students were expected to have developed towards the end of basic education. It was intended as a reference for the organisation, development and evaluation of learning. The competencies of the graduate profile are specified in Table 3 below.

Table 3: The competency based graduate profile for Mexican basic education

⁵⁰ Perfil de egreso.

1	Use oral and written language clearly, fluently and appropriately, in order to interact in different social contexts. Recognises and appreciates linguistic diversity.
2	Use argumentation and reasoning to analyse situations, identify problems, ask questions, make judgments and propose different solutions .
3	Select, analyse, evaluate and share information from different sources and uses technological resources at its disposal to deepen and expand learning permanently .
4	Use knowledge to interpret and explain social, economic, cultural and natural processes, and to take decisions and act, individually or collectively, in order to promote health and environmental care, as ways to improve the quality of life .
5	Know the human rights and values that favour democratic life, implements them when analysing situations and making decisions with responsibility and respect for the law .
6	Recognise and value different cultural practices and processes. Contribute to respectful coexistence . Assume multiculturalism as wealth and form of coexistence in social, ethnic, cultural and linguistic diversity .
7	Know and value one's characteristics and potential as a human being, identifies itself as part of a social group , undertake personal projects, strive to achieve its purposes and assume responsibility the consequences of their actions.
8	Appreciate and participate in various art forms. Integrates knowledge of cultures as a means to know the ideas and the feelings of others, and to manifest their own.
9	Recognise itself as a being with physical potential that allow it to improve motoric skills, promote an active and healthy life, and to interact in leisure , recreation and sports contexts.

Source: Own elaboration on the basis of SEP (2006). Emphasis mine.

With the 2006 reform, the MoE argued to break with the knowledge-based approach and objectives-based curriculum⁵¹ that had characterised secondary education since its origins, towards an approach based on general competencies, such as reading comprehension, math skills and the transmission of ethical and citizenship values (SEP, 2006). The curriculum also specified subject-specific competencies which described what all students should be able to master in the different subjects, as well as expected learning outcomes that students at the end of each school period were expected to have achieved.

Contrary to the preschool reform, the secondary curricular reform was subject to more controversy from academia and society. Miranda argues the reform to secondary education can be considered “a paradigmatic case of curricular tension” (2010, p. 48), and Cuervo et al. argue that the reform generated tensions “beyond the conflicts that every reform might generate” (2009, p. 158). The first reform proposals in 2004 were heavily critiqued by various education actors (Miranda López & Reynoso Angulo, 2006, p. 1437). Both the national teachers’ union (SNTE) and the dissident teachers’ union (CNTE) opposed the reform initiative, as they argued that their opinions were only partially taken into account (Cuervo et al., 2009, p. 1460). The CNTE also was of the opinion that the reform represented neoliberal interests, would lead to a “toyotization”⁵² of education and subject Mexico to the economic interests of the global economy (Miranda López & Reynoso Angulo, 2006). The critique was also focussed on the conditions in which teachers had to implement the new reform as well as the changes to the content⁵³ (Miranda Lopez, 2010, p. 49).

⁵¹ *Currículo por objetivos.*

⁵² In Mexico, the term ‘toyotización’ denotes the transition from a phase of ‘Taylorist education’, that is, education that fitted within an idea of the welfare state, to a phase in which globalisation, flexibilization, privatization and consumerism dominate education. The term generally denotes neoliberal reforms in education.

⁵³ The reduction of history contents, and the supposed exclusion of pre-Hispanic cultures became the focus of critique in the context of a fear of loss of national culture in the context of globalisation. However, the content was the same during the 1993 reform. The reduction of content of civics and ethics was also critiqued, as well as the reduction in Mexican geography.

In academia too, critiques of competency-based approaches in education had grown. Díaz-Barriga for example, argues that,

[t]he discourse of models such as competency-based education [...] are nothing but signs of the corporative or managerial way of thinking that has become more and more important within education during the last decade [...]. This perspective gives priority to the ideas of efficiency, quality and excellence as necessary to create highly competent and competitive human resources, associated with certification and assessment systems for the educational or professional quality and with the search for equivalence between study plans of different institutions, regions and even countries (2005, p. 11).

The MoE decided to revise the curriculum and seek collaboration with different universities and the SNTE. Oaxaca and Michoacan, where the dissident teachers' union CNTE dominated the state union congress, did not participate in the pilots of the reform (Miranda López & Reynoso Angulo, 2006). Also, the national government assigned additional resources to the provision of materials, infrastructure, and training (Miranda López & Reynoso Angulo, 2006). Miranda (2010, p. 53) points out that apart from the changes in working conditions, the curriculum itself was not changed substantially.

With regard to the context of practices and outcomes of the competency-based reform several authors argue that an obstacle was that although information about the reform was accessible online, many teachers did not know how to use the Internet or did not have access to computers. Also, teachers expressed they needed more information with regard to the reform, as well as teacher training (Reyes & Pech Campos, 2007, p. 181). The commissioned evaluation of the reform concluded that although a large number of teachers expressed to have understood the aims of the reform, teachers were less positive about the quality and quantity of materials and training they received: About a third of interviewed teachers required more information about competency education. Especially in the southern states such as Oaxaca and Chiapas teachers experienced difficulties in implementing the reform due to inexistent infrastructure (Rothman & Nugroho, 2010). Cuervo et al. (2009) found that teachers experienced the cascade way in which the reform was implemented as

too vertical. Also, the change towards expected learning outcomes drastically changed the format for classroom planning, and teachers experienced an increase in bureaucracy and lack of feedback. The different methodology for different subjects also generated confusion. In the two schools she researched, Cruz Ramos (2011) found that teachers did not entirely understand competency discourses and continued to construct their own explanations and strategies to enact the reform in their classrooms. In some cases, this has led to a simulation in the implementation the competency reform.

3.3 Conclusions

In this chapter, I have discussed the adoption and contextualisation of competency-based approaches to education in Mexican curricular reforms prior to the curricular reform to primary education, in order to understand the ways in which the meanings of the signifier competency were reconstructed in specific historic and political contexts.

I have demonstrated that competency-based approaches were introduced in the 1990s, in the form of labour competencies, in vocational education and training. The adoption fitted within the context of the Mexican political and economic modernisation project. Competency education was perceived by the government and MoE at the national scale, as well as international organisations, to facilitate the entry of Mexico into the (imagined) global economy by generating the human capital for the so-called knowledge and information society.

In the 2000s, competency-based curricular reforms were introduced to all levels of Mexican education. In Chapter 1, I argued that although the political colour of the national government had changed towards the right-of-centre PAN, the economic imaginary continued to draw on the neoliberal project. The education project continued the focus on quality and equity goals developed in the 1990s. However, the signifier competency changed its meaning slightly. Competencies were still promoted by the OECD which emphasised the role of education and

development of skills for integration in the global economy. But competencies also acquired meaning within basic education. The curricular reforms drew on the idea that basic education should develop the key skills and for students to be able to fully participate in society and the economy. Moreover, in basic education, the Mexican government started to promote a competency approach that was informed by human development and human rights discourses, which emphasised the importance of gender, diversity and interculturality. Both these ideas were promoted by UNESCO. For the MoE, competency-based approaches acquired meaning within these discourses, which can be explained as an attempt of the Mexican MoE to move away from the idea of labour competencies to competencies for education and lifelong learning, while at the same time competencies retained its promise of economic growth and integration into the international knowledge society.

It was also in the 2000s that competency-based approaches started to receive critique from within academia and the dissident teachers' union CNTE, first within academia and then in secondary education. Critics interpreted competency education as managerial and neo-behaviourist discourse inspired by neoliberal imaginaries, and they critiqued the role of international actors in Mexican policy.

In addition, while at the discursive level at the national MoE scale competency reforms were promoted, the experiences with the enactment of competency policy show both difficulties as well as contestation. However, detailed research is missing to understand how competency practices are developed and are shaped throughout schools in Mexico.

In the next chapters, I discuss how the experiences and meanings of competency-reforms as described above, formed an essential part of the context of influence that shaped the adoption, transformation and enactment of the competency-based curricular reform to primary education.

Chapter 4 Temporary settlement of competency-based approaches in the curricular texts

From the start of the writing phase of the curricular reform in 2007, until the final version in 2011, the global policy idea competency-based education was operationalised into different curricular texts. In this chapter, I discuss the particular way in which competency-based curricular approaches were translated and temporarily settled, that is, interpreted and given meaning in the curricular texts of the 2009-2011 reform to Mexican primary education. As I will discuss in further chapters, this particular translation of competency-based education into text is *temporary*, because its meaning is re-interpreted and enacted by policy document readers, such as teachers. I discuss the discourses that informed the competency-approach, as well as the international references and ideologies or imaginaries⁵⁴ that “shape thinking about how things might be” (Rizvi & Lingard, 2010, p. 8) in the text. I also discuss the particular interpretation or operationalisation of competency-based education in the curricular text. In this chapter, I identify *in what way* competency-approaches were settled in the texts, and *what* changes were made between the different versions. In subsequent Chapter 5, I analyse the political forces that influenced these interpretations and changes.

From 2007 until 2011, the curricular texts went through a process of writing and rewriting, and piloting and implementation. The national Ministry of Education (MoE) argued that the pilots allowed education actors at the state and school scales to participate in the design of reform (SEP, 2011b). To evidence the changes to the curriculum, and the scope for participation during the text writing phase, in Section 4.1, I discuss the contextualisation of competency-based education in the first version of the curricular reform text (Curriculum 2009), followed by a discussion of the last version (Curriculum 2011) in Section

⁵⁴ In Sub-section 1.2.2, I defined imaginaries as socio-economic ideologies, on which education actors draw to shape and imagine their relationship to the world.

4.2. Lastly, in Section 4.3, I draw some conclusions about the ways in which competency-based education temporarily settled in the different curricular texts.

4.1 Curriculum 2009

In this section, I first discuss the imaginaries about education and development that were drawn on in Curriculum 2009 by discussing the context of influence. I subsequently discuss how competency-based education was translated (operationalised) in the curriculum.

4.1.1 Context of influence and imaginaries in the text

With the reform of preschool and secondary education on the basis of competencies, the Mexican MoE saw the need for a competency-based reform of primary education. The main strategy towards this goal was to “carry out a comprehensive reform of basic education, focused on the adoption of an educational model based on competencies that meets the development needs of Mexico in the twenty-first century” (SEP, 2008a, p. 5). The reform to primary education, Curriculum 2009, was developed on the basis of 2007-2012 National Development Plan and 2007-2012 Education Sector Plan,

which aimed to raise the quality of education so that students can improve their level of educational attainment, have the means to access greater well-being and contribute to national development (SEP, 2008a, p. 5).

In addition, the Alliance for the Quality of Education (ACE), signed in May 2008 by the national government and the National Union of Education Workers (SNTE) called for a reform of approaches, subjects, and content.

The representation of the context of influence, that is, the perceived need for the reform, to the curricular reform in the text, was made up of global contexts which were linked to national Mexican context. This was set within human

development and human rights discourses. The texts referenced international agreements that emphasise the importance of basic learning needs and lifelong learning (Jomtien 1990, Delors 1996), as well as the importance of attention to diversity and interculturality and gender, and the right to quality education. For example, references are made to UNESCO's 1996 Universal Declaration on Linguistic Rights, and Mexico's 2003 General Law of the Linguistic Rights of Indigenous Peoples, which recognises and protects the linguistic rights of indigenous peoples as part of the human rights, stating that speakers of indigenous languages will have access to compulsory education in their own language and Spanish (SEP, 2008a, p. 11). This was linked to changes in the Mexican context, for example, the recognition of a multicultural and multilingual country, and rural and indigenous people perform lowest on standardised test. In the texts, this was argued to be due in large part to the lack of articulation of educational provision with the culture and language of the students, as *castellanización*⁵⁵ continues to be used as the only form of classroom teaching (SEP, 2008a, p. 17). The MoE emphasised the need to solve infrastructure of education to facilitate these rights.

This was linked to Mexican challenge to increase quality. Quality of education, in this case, is defined as knowledge and skills as measured on the standardised tests PISA and the Mexican National Exam of Academic Achievement in Schools⁵⁶ (ENLACE). The MoE states that the quality of basic education, as measured on PISA 2000 and 2003, is in the lowest ranks of OECD countries (SEP, 2008a, pp. 21-22). Whereas in the first document that was written about the reform, it was stated that the reform was in line with the recommendations of the OECD on the basis of Mexico's results on PISA 2006 (SEB/SEP, 2008, p. 10); in Curriculum 2009, these references disappeared. A human capital discourse to education is conspicuously absent. The terms 'competition' and 'globalisation'

⁵⁵ *Castellanización* refers to the displacement and assimilation of indigenous languages by the Spanish language.

⁵⁶ *Examen Nacional del Logro Académico en Centros Escolares*.

are mentioned twice, and 'capital', 'market', 'productivity' and 'economic growth' are never mentioned. Instead the terms 'ever changing society', 'future society', 'growing complex society', and 'twenty-first society' and 'quality education' are used. In the discussion of the context of curricular text production at the national scale, I discuss how and why this can be explained by the efforts the MoE made to reduce the association of the word competency with competition.

4.1.2 Operationalisation of competency-based education

After having established links with international and national contexts, the need for a curricular reform is established, and specifically for the reform of curricula, contents, materials and methods on the basis of competencies. By presenting the reform in this sequence, the choice for a competency curriculum seems to flow logically as the best solution from the need to reform. The MoE states that the main aim of the curricular reform is the transformation and the improvement of pedagogical practices in order to orientate them toward the development of competencies in students (SEP, 2008a, p. 23). In one page, the SEP explains competencies as follows:

A competency implies knowing to do (skills) with knowing (knowledge), as well as the assessment of the consequences of the impact of that doing (values and attitudes). In other words, the manifestation of a competency reveals the putting in practice of knowledge, skills, attitudes and values to achieve purposes in a given context (SEP, 2008a, p. 36).

This is the same definition as the one that was used in the 2006 reform to secondary education, and illustrates the goal of the MoE to reform the entire curriculum of basic education. In the texts, competencies mobilise knowledge, skills, attitudes and values towards the achievement of specific objectives; they are more than knowledge, know-how or knowing how to be. It is argued that to possess either knowledge or skills does not mean to be competent.

Competencies for life

Central to the particular way in which the curricular reform to primary education operationalises competency-based education is a set of five competencies for life⁵⁷ that students should have developed towards the end of their education. These competencies for life were already specified in the 2006 reform to secondary education. The five competencies are: competences for continuous learning; information management competences; situation management competences; competences for living together; and competences for life in society. The texts reads these competencies are important "all over the world, the required education levels of men and women to participate in society and solve problems of a practical nature are constantly increasing" (SEP, 2008a, p. 36). Therefore, the curriculum states it is necessary that basic education contributes to "the development of broad competencies that improve the way of living and living together in an increasingly complex society (SEP, 2008a, p. 36).

The Mexican competencies for life are an adaptation of the idea of basic or key competencies which are related to the idea of lifelong learning, and which are promoted globally, for example in the UNESCO's learning to be report, OECD's DeSeCo⁵⁸ project (Rychen & Salganik, 2001), and EU's Eurydice project (Eurydice, 2002), which aim to define the basic competencies that all population should acquire in order to live in modern life, such as domination of mother tongue, team work, problem solving skills, basic maths and natural sciences, ICT skills and learning to learn (Farstad, 2004).

⁵⁷ *Competencias para la vida.*

⁵⁸ Definition and Selection of Competencies. DeSeCo, under the auspices of the OECD, was led by the Swiss Federal Statistical Office in collaboration with the US Department of Education, National Centre for Education Statistics (Rychen & Salganik, 2001).

Graduate profile

Another important element in the operationalisation of competency education in the text is the “graduate profile”, which was equally already there in the 2006 reform to secondary education. The graduate profile specifies “the performance standards; that is to say: the knowledge, abilities, and competencies that every citizen should achieve upon finishing basic education, and which are in line with the educational needs that the characteristics and dynamics of modern societies and new educational contexts require” (SEP, 2008a, p. 38). In other words, the profile “defines the type of student that is expected at the end of basic education” (SEP, 2008a, p. 38). The graduate profile specifies that students should be able to: “use oral and written language; use argumentation and reasoning to analyse situations, identify problems, ask questions, make judgments and propose different solutions; select, analyse, evaluate and share information; health and environmental care; different cultural practices and processes; a social group; art forms; and develop physical potential” (SEP, 2008a, p. 38). This profile is intended as a teaching and learning reference, as well as a basis for assessing the effectiveness of the educational process in primary education.

Expected learning outcomes

The curricular reform also specifies expected learning outcomes.⁵⁹ These are specified for each subject and for several phases during the year, and are intended to guide the work of teachers towards the development of the competencies. In the text it is argued that they are intended to facilitate decision-making by teachers, and as a reference for improving communication and collaboration between teachers, students and parents (SEP, 2008a).

⁵⁹ *Aprendizajes esperados.*

Whereas the competencies for life and graduate profile define broad or generic competencies, it could be argued that the disaggregation of competencies in expected learning outcomes implies a narrow approach to competencies, which is related to task analysis. According to Diaz Barriga Casales (2009, p. 6), "in the case of Latin America this tends to stiffen the development of competencies". This author points out that the task analysis approach often leads to the fragmentation of behaviour, in the style of behavioural objectives, rather than the development of integrated knowledge, skills and behaviour outcomes. Whereas the competencies for life ask teachers to develop broad competencies, the expected learning outcomes describe specific tasks that should be undertaken to achieve the competencies. This could not only lead to a fragmentation of the curricular content, but could function as a kind of control which shows the teacher that the student dominates certain knowledge or skill (Díaz Barriga, 2006). The curricular text of the competency reform combined mixed messages in a hybrid text.

Another inconsistency within the curriculum sends a mixed message. Whereas the texts asked teachers to develop competencies for life, graduate profile, and expected learning outcomes, not all subjects specified expected learning outcomes. For example, for the subject Spanish no mention is made of competencies, or expected learning outcomes (SEP, 2008b). These mixed messages in the curricular texts created confusion in teachers' practices, as I discuss in Chapter 7.

Digital skills

In the text, the importance of information and communication technologies in the education is pointed out. It is argued that because of globalisation, digital skills are a requirement for the labour market (SEP, 2008a, p. 31). In the case of indigenous education, it is pointed out that this development depends on the possibility of connectivity. Also, educational projects based on the use of ICT must take into account cultural and linguistic diversity of the population they are

targeting (SEP, 2008a, p. 31). However, in curriculum 2009, ICT skills are not yet translated in specific content.

Means and materials of support

The MoE recognises in Curriculum 2009 that for the development of competencies, the presence of means and materials of support,⁶⁰ such as large sheets of paper, school libraries, computers, or digital projectors, is essential. According to the MoE, these should be appropriate to the conditions of social, cultural and linguistic environment. New resources that are the result of advances in ICT should be added to existing resources. The MoE moreover states that it is important to ensure consistent relationships between the development of teaching content and use of ICT, as well as ensuring that teachers have the necessary competencies to use these pedagogically (SEP, 2008a, p. 33).

4.2 Curriculum 2011

Curriculum 2009 was piloted and rewritten and after three years of rewriting, the Curriculum 2011 is the last version of the curricular reform. In these documents, the curriculum of primary education is integrated with the preschool and secondary education curriculum, which are all geared towards the graduate profile.

4.2.1 Context of influence and imaginaries in the text

In Curriculum 2011, the specific international references to the need for a curricular reform, for example to Education for All 1990, have now disappeared.

⁶⁰ *Medios y materiales de apoyo.*

It is argued that the “social, demographic, economic, political and cultural transformation of the country in the twentieth and early twenty-first century has led to the depletion of an educational model that stopped responding to the present and future conditions of Mexican society” (SEP, 2011b, p. 11). The need to transform the curriculum has changed into ‘a trend’ of the renewal of scientific and technological knowledge, as well as the transition from a focus on production to a knowledge economy. This calls for reforms that take into account “internal diagnostics and international experiences, which are increasingly closer and comparable in their visions, experiences and knowledge” (SEP, 2011b, p. 12). The MoE argue that international references with regard to education, processes and results, have been accepted as relevant and valuable, and need to be considered in order to improve education. Therefore, they argue, the national education system should be organised so that each student develops skills that allow them to function in an economy where knowledge is the main source for creating value in a society that demand new performances to engage in a framework of plurality and internal democracy, and in a global and interdependent world (SEP, 2011b, p. 12). A few references to knowledge societies and economic growth are now also included in the text.

Similar to Curriculum 2009, Curriculum 2011 is set within human development and human rights discourses, and emphasises the need to improve the quality of education. As in Curriculum 2009, the improvement of education quality implies the increase of performance on standardised test, but it is added in Curriculum 2011 that to achieve this, evaluation, transparency and accountability measures are necessary (SEP, 2011b, p. 9).

In Curriculum 2011, the orientation of the curriculum is now also learning-centred, in addition to competency-based (SEP, 2011b, pp. 26-28). Learner-centred or child-centred education is a clear example of global education policy discourse (Verger et al., 2012b). Below, I discuss the changes to the specific operationalisation of competency-based education in Curriculum 2011.

4.2.2 Operationalisation of competency-based education

In Curriculum 2011, the information about competency-based education is slightly expanded with a section. Curriculum 2011 reads:

Educational research has sought to clarify the term competences, agreeing that these are closely linked to solid knowledge; and that its implementation involves the incorporation and mobilization of expertise, hence there is no competence without knowledge (SEP, 2011b, p. 40).

As I argue in the following chapters in this thesis, the competency reform attracted critique, and it could be argued that this section is added by the MoE to contradict the critique that competency-approaches overly focus on skills. In Curriculum 2011, the definition of competencies is now also shaped by the ideas of the Swiss educationalist Perrenoud as follows:

(...), for this reason the concept 'mobilizing knowledge' (Perrenoud, 1999) is used. Making sure that basic education contributes to the formation of citizens with these features involves setting the development of competences as the central educational purpose (SEP, 2011b, p. 40).

The approach to competency education proposed by Perrenoud is characterised as 'holistic' or comprehensive (Moreno Olivos, 2012, p. 2), in that it moves away from a narrow approach to competencies focussed on disaggregated skills for work, and is oriented by a socio-constructivist approach to learning. Perrenoud's approach focusses on the development of broad skills and "psychosocial skills", which have translated to Mexico as the competencies for life. In his books, Perrenoud emphasises that the goal of education should be to prepare students for life. The addition of Perrenoud as a reference in shaping competencies can be explained through an exploration of the context of text writing, in following chapters.

Expected learning outcomes and subject specific competencies

Most of the changes to the curriculum take place to the curricular content. All the subjects now specify expected learning outcomes, as well as subject specific competencies, which are the knowledge, skills and attitude/values standards that students should develop in the specific subjects. As I discussed above, the specification of expected learning outcomes risks a checklist interpretation of competency-based education, and possibly leads to a fragmentation of curricular content.

Curricular standards

In addition to the above changes, to Curriculum 2011, an extra set of standards is added: the curricular standards.⁶¹ The standards are “descriptions of achievements and define what students are expected to be able to show” (SEP, 2011b, p. 29). The curricular standards synthesise the expected learning outcomes. They are specified for the third year and last year of primary education. Curricular standards are established for Spanish, English, maths, sciences, and digital skills. Also, standards for reading skills are established, which specify how many words a child should be able to read per minute in the different grades.

The curricular standards are a clear example of how the curriculum draws on global policy ideas. The curriculum states that the curricular standards are comparable with international standards, and that they are related to national and international assessments. The standards are also meant as a reference for the design of student evaluation instruments. The MoE states that the curricular standards define a type of global citizenship, as a product of the domination of skills and languages that allow the entry of Mexico into the knowledge economy. The document specifically states that the standards respond to the

⁶¹ *Estandares curriculares.*

recommendation of the OECD in 2007 to Mexico to increase its scores on PISA, which, in a clear hyperbole is presented as a “global educational consensus” (SEP, 2011b, p. 85).

With the definition of another set of standards, in addition to the content specific competencies and expected learning outcomes, Curriculum 2011 moves towards a competency-approach as observable and evaluable content. In addition, the development of standards for only Spanish, English, maths, sciences, digital skills, reading skills might reduce the taught curriculum in favour of other elements such as diversity, interculturality, gender. Also, an interpretation of reading skills as words per minute, might mean a reduction of the complex idea of literacy.

English language skills

In Curriculum 2011, English is now established as a second language (L2). The standards reflect the standards described in the national language level certification (Cenni), and the Common European Framework of Reference for Languages: learning, teaching, assessment (CEFR), which it is stated provides students with the possibility of having a competency linked to life and work (SEP, 2011b, p. 87). This is another example of how the Mexican curriculum draws on global policy ideas and standards.

The importance of English is also reflected in the graduate profile. The ‘need to speak an additional language’, as it was established in Curriculum 2009, has now been changed into ‘the need to speak a mother tongue and English’ (SEP, 2011b, p. 39). As such, global goals (which once were local goals) are prioritised over local goals, such as the learning of indigenous languages.

Digital skills

Curriculum 2011 plays a clear focus on the importance of “information and communications technology (ICT) for the economic, political and social development of countries, in the context of the knowledge economy”. Therefore, the text stipulates that “no educational reform can avoid standards for digital skills, which are descriptors of ICT knowledge and know-how which are a fundamental basis to develop lifelong competencies and promote their integration in the knowledge society” (SEP, 2011b, p. 64). The curricular standards for digital skills are aligned with UNESCO's International Society for Technology in Education (SEP, 2011b, p. 65).

To meet the standards of digital skills, materials such as electronic whiteboards, computers, laptops, printers, projectors and computer tables are needed. The text argues that it is important to continue working with business groups in the development of strategies and provision of equipment (SEP, 2011b, p. 65). However, it could be argued that to leave the provision of educational materials, essential to achieve curricular content, to private market mechanisms rather than the public sector is not only unethical but also unlikely to reduce inequalities.

Throughout the curriculum, the emphasis is put on the use of audio-visual materials, multimedia and the Internet for the development of competencies. Also, the competencies for life, which specifies the five basic competencies that all Mexican students should have developed towards the end of basic education, now explicitly define digital skills. However, with only 53.9 per cent of Mexicans with access to the Internet in 2015,⁶² this goal presupposes a reality that does not exist.

⁶²Information retrieved in January 2014 from:

https://www.amipci.org.mx/images/Study_of_internet_users_Mexico.pdf

"Curricular frameworks" and "curricular parameters" for indigenous education

For the first time in the development of the national curriculum, a proposal for indigenous education is now also part of the curriculum, which consist of "curricular frameworks"⁶³ and "curricular parameters".⁶⁴ Curricular frameworks are the "pedagogical, curricular and didactical guidelines", and aim to,

[c]onnect the expected learning outcomes that the twenty-first century Mexican society requires, with those that indigenous and migrant community emphasise on the basis of their representations of the world and their concrete material contexts" (SEP, 2011b, p. 57).

Based on curricular frameworks, the curricular content is developed and articulated with the social, cultural and linguistic diversity context. The pedagogical approach is competency-based. The curricular parameters specify the curricular guidelines for teaching indigenous languages, in addition to Spanish (as L2) and English (as L3). They contain purposes, approaches, general contents, and educational and linguistic recommendations.

However, at the time of research, the frameworks and parameters had not been translated to specific curricular content in the states. Moreover, no curricular standards were developed for indigenous education. Within a context that places emphasis on evaluation of standardised content, it could be argued that this shifts this focus of teaching towards subjects for which standards are developed.

4.3 Conclusions

In this chapter, I have discussed the particular way in which competency-based education was translated, operationalised, contextualised or temporarily settled in the curricular texts of the 2009-2011 reform to Mexican primary education. I have described the discourses that informed the specific translation of

⁶³ *Marcos curriculares.*

⁶⁴ *Parametros curriculares.*

competency education, as well as the international references and imaginaries. The curricular reform was written and re-written over several years, on the basis of different pilot studies which the national MoE argued were intended for education actors at the state and school scale to participate in the design of reform, and I have discussed both the first version (Curriculum 2009), as well as the last version (Curriculum 2011). Looking at two different versions of the curriculum, has allowed me to argue which elements of the way in which competency-based education was operationalised changed, and which stayed the same.

In the curricular texts Curriculum 2009, competency-based education was adopted in the context of the perceived changes in modern society. The MoE framed the approach within human rights and human development discourses, and emphasised the importance of diversity and gender. The broad competencies for life as well as the competency-based graduate profile were adopted from the 2006 reform to secondary education. The text also specified the need to develop expected learning outcomes. The specification of expected learning outcomes implies a reduced, task-based approach to competencies, as measurable skills. The curricular texts are hybrid texts, in which broad competency discourses were combined with an approach that emphasises knowledge/skill outcomes. In addition, the text is internally incoherent, as not all the subjects specify expected learning outcomes.

In Curriculum 2011, the overall human rights and human development discourses stayed the same. The specific references to international organisations disappeared but the need for evaluation, in order to increase quality education was added. The competencies for life and graduate profile slightly changed to incorporate the importance of English and digital skills. The most important change took place at the level of standards: all the subject were specified, and an extra set of standards (curricular standards) was added, which was said to form the basis of external evaluation instruments. Although a curricular framework for indigenous education was added, it can be argued that the specification of competency standards only developed for Spanish, English,

maths, sciences, digital skills and reading shifts the focus away from indigenous education as well as other elements such as gender and diversity that are difficult to measure.

In this chapter I have addressed *how* or *in what way* competency-based education was operationalised or temporality settled in the curricular texts, and *what* changed over the years. However, the contextualisation of the policy idea competency-based education also needs to be understood in its economic, social, and educational contexts (Harris et al., 1995, p. 9) to understand how it was interpreted and enacted. Therefore, in the next chapters, I discuss the processes at the national, state, and school scales during the text production of Curriculum 2009 and Curriculum 2011, which address the *why* of the settlement of competency-approach in the curricular texts as explained above.

Chapter 5 Re-contextualising competency-based education at the national scale

This chapter focusses on the context of text production (Ball 1994), or the processes of production of the text (Codd 1988) around the curricular reform, that explain the continuities, changes, and contradictions in the curricular texts. I examine the politics of competencies by discussing the struggle between different education actors to influence their meaning in the processes around the competency-based curricular reform. I discuss this within the specific Mexican political context at the national scale of the trajectory, in order to further understand the ways in which competency-based education was contextualised, and what has been the scope for participation of the different education actors.

In Section 5.1, I discuss how competency-based education was interpreted at the Mexican national scale, and how and why it was adopted. In Section 5.2, I discuss three mini-case studies that explore the ways in which the MoE tried to control the meaning of competency-based education across different actors at the national scale (that is, 'horizontally'). In Section 5.3, I discuss some of the mechanisms in which the MoE tried to control the meaning of competency-based education at the state and school scales of the trajectory, that is, 'vertically'.

5.1 Competencies accommodate Mexican agendas at the national scale

The policy idea of competency-based education was adopted and translated in the competency-based curricular reform at the national scale. In this section, I explain how and why. Different interpretations of competencies and the competency-based curricular reform could be distinguished on the basis of actors' representation of: one, the competencies concept (integrated set of knowledge, skills and attitudes/values versus skills, positive/negative connotation); two. the context of influence and text writing of the reform

(dominant imaginaries/views/interests, participatory nature); and three. the context of practice (relevancy, need for alternative curricular reform, possible effects).

5.1.1 Interpreting competency-based education within the national MoE

With the MoE, competencies were interpreted as an integrated set of knowledge, skills, attitudes and values, and it had a positive connotation. My respondents explained that the competency-approach in the reform was about the mobilisation and application of this set to day-to-day life situations. One senior MoE official from the Department of Curricular Development explained that,

[w]hen in the curriculum we refer to problems, these are not just mathematical problems, or problems related to work situations, but it is more general about solving problematic situations that appear to us in life at all ages (I-NA6).

Others within the MoE voiced the idea that the competency reform was about education and development for life beyond the classroom. The competency-approach in the curricular reform also meant the development of reflexive thinking and decision-making skills. In addition, my respondents within the MoE emphasised over and over again that the idea of competencies was not about competition. The senior MoE official from the Department of Curricular Development explained that,

[t]he competency approach has nothing to do with competitiveness. It is a 'holistic' conceptualisation of education, which is about putting in practice interrelated sets of knowledge, skills, attitudes and values for the resolution of specific problems of personal, public and professional life (I-NA6).

Officials within the MoE acknowledged that competency-based training emerged from the need to articulate vocational education and training with the labour market, as I explained in prior chapters, but they argued that the curricular reform to primary education moved away from a 'work skills'

approach, and took a 'competencies for life' approach, which was applicable to basic education. One senior MoE official from the Department of Educational Materials argued during a group interview that,

[i]n Mexico, as in the rest of the world I presume, the competency approach comes from the workplace, factories, industry, service sector. But those who critique it just stay with these origins. The theoretical discussions we have here are about how you move from the job skills approach to the life skills approach, which is totally different (GI-NA1).

In this sense, competencies can be thought of as a floating signifier, which the MoE actively changed through theoretical discussions and other actions (which I discuss in the remainder of this chapter). They aimed to change the meaning of the signifier (that is, the signified) to take on a meaning of competencies orientated toward life inside and beyond schools, rather than competencies for the work place.

5.1.2 Leaping to an imagined modernity

The MoE was embedded within an imaginary of modern society as a global knowledge society, which demands reforms to education. The following quote from an interview with a senior MoE official from the Department of Teacher Professional Development illustrates this imaginary:

The knowledge society moves toward a context where the availability, access and application of knowledge have become the most valuable resource in promoting opportunities and the engine of economic and social development in the contemporary world (I-NA1).

In addition to the idea of the knowledge economy, developments in pedagogics and human development were perceived to demand education reforms, as one senior official within the Department of Curricular Development argues in the following quote:

Worldwide more comprehensive approaches to human development have been developed, involving many different aspects of education and the development of all students' capabilities and potentials. The intention

of the reform is to equip students with the necessary elements for a better life in democratic societies (I-NA8).

Within the MoE, this imagined global education arena was made up of actors, such as international education and financial organisations, discourses about education and development, such as the information and knowledge society, as well as global education ideas and documents. The global education arena worked as an imagined space, which described both perceived education realities and solutions to get there: On the one hand, respondents within the MoE argued that Mexico was now part of the global knowledge society, which meant they had to adopt these educating policies:

Mexico is part of the international arena, we can no longer talk about country specific education visions. No. It is about globalised education visions now (I-NA6).

On the other hand, the global education arena was seen to offer education solutions in order for Mexico to become part of the knowledge society. Competency-based education was perceived as one of those demands/solutions, as a senior official from the Department of Educational Materials remarked during a group interview:

The competency approach is about the transformation of society. Knowledge and education content are losing validity, because of the rapid generation of scientific and technological knowledge. So you cannot focus any longer on trying to teach that knowledge, you have to focus on teaching the tools to construct and search knowledge. The competency approach attends to this social need (GI-NA1).

For the MoE, this context of influence to the reform to the primary education curriculum was made up of an ensemble of international as well as national actors, which conflated the aims emanating from the global arena with that of Mexico:

The context to the reform is international expertise, national expertise, and the requirements of your population. The intellectual origin of the reform is not somebody specific, but rather the sum of everything (I-NA4).

These global goals, rather than being imposed, had become conflated with, and fitted, the goals of the Mexican government, since, “well...Mexico has set itself the aim to grow economically” (GI-NA1).

The OECD was an important actor that was associated as having influenced the approach to competencies taken in the curricular reform. Both the OECD and the MoE emphasised that the OECD had not been involved in the actual writing of the curricular reform, but that the participation had been at the level of conducting analyses, contributing ideas and sharing experiences. One senior MoE official said that “[t]he competency approach in Mexican education comes from the views of the OECD” (I-NA8). For example, the Definition and Selection of Competencies (DeSeCo), overseen by the OECD, was mentioned as having shaped the idea of competencies in the curricular reform. The DeSeCo project aimed to specify the key competencies that all students, towards the end of basic education, should possess as a reference points for assessing and measuring the output of educational processes (Rychen & Salganik, 2001). In the DeSeCo document it is stated that competency-based education is necessary to attend to the demands of ‘modern life’, such as changes in technology, increasing diversity of societies, and growing interdependence due to globalisation (OECD, 2005, p. 7). This discourse, was reflected in the discourse in the curricular reform texts, as I described in Chapter 4.

The standardised evaluation PISA, developed by the OECD, also played a defining role:

During this administration, the indicator for measuring quality are evaluations, derived of course from the results of international evaluations such as PISA. Here, a similar evaluation instrument is generated: ENLACE⁶⁵, which indicates how close or far we are from what politics established as the quality goal (GI-NA1).

⁶⁵ Mexican National Exam of Academic Achievement in Schools.

When I asked a senior official from the Department of Curricular Development whether competency-based education answered to local or global demands, he replied in the following manner:

I will answer you with a different question: where does the competency approach come from? From international agreements to meet the exigencies of a conglomerate of countries with an interest in economic growth and the development of citizens that have higher levels than what we have here (I-NA8).

The perception of the context of practice of the reform was sometimes removed from the everyday context of many Mexicans. This is illustrated by the following comment by a senior official from the National Institute for Educational Evaluation (INEE), which participated in the development of the teacher training course that was part of the reform:

The director of Department of Educational Materials used to say that the development of digital skills would not be a problem, because in the entire country, in the shittiest town, there is an Internet café (I-NA7).

This desire of the Mexican national MoE to be part of the global education arena and education trends, embodied ideas of modernity and idealised futures/realities. Within this rationale, the reality of many Mexican teachers was envisioned as 'backward' and outdated, which is illustrated by the following quote:

It is very difficult for teachers who live in very poor and far away communities that do not have access to technology to understand the need for the reform. There, the knowledge from the 1985 textbooks is still valid. But those are not the problems of life nowadays. But it is the problem they have in that moment. So there is a clash of cultures, of approaches even, between what we see as the federation, and the day-to-day situation in the classrooms: we have a more macro approach because of the relations with international organisations and experiences of other countries (GI-NA1).

A senior official from the INEE illustrated this idea by saying that Mexico applied the complex competency approach "because of its desire to leap to modernity" (I-NA5). However, the MoE argued that the competency approach within the reform was flexible enough for teachers to make it contextually relevant. The

floating signifier competencies, thus worked as an acceptable 'compromise' (Steiner-Khamsi, 2012, p. 459) accommodating both (perceived) international demands and local agendas and contexts at the national scale.

5.1.3 Emphasising continuity

In addition to the MoE's desire to be part of the global education arena, a competency approach to the curricular reform also remained unquestioned through the existence of a rationale that emphasised the need to give continuity to prior reforms. In the education sector programme of the 2006-2012 administration (SEP, 2007), the goal to articulate the curricular and pedagogical approaches of preschool and secondary education with primary education was established. The MoE enacted and reproduced this rationale to give priority to prior competency reforms. For example, the MoE argued that the competency-based graduate profile that was developed in 2006, was essential in defining the competency approach of the reform to primary education. The goal for the 2006-2012 administration to align the curriculums of basic education reduced the scope for questioning the choice for competencies within the MoE.

In addition, the MoE emphasised the idea that the main elements of the Mexican version of the competency approach were already underlying the prior reform to primary education in 1993. A senior official who worked on developing the new textbooks, argued that what really changed was the use of the term competencies:

We have been working with the constructivist model since 1993, but the concept of competencies is only mentioned specifically since 2008. We have not fundamentally changed the underlying approach, rather, we have aligned it with the term competencies (GI-NA1).

During a group interview, a senior official in the Department of Educational Material even argued that the reform simply made more explicit the way good teachers have always taught:

Good teachers have always worked on the basis of competencies, because they always give an education for life, and that's what the competency approach is about: helping the child to solve a problem it has, and there are problems in whichever community, and that's what we're asking of teachers. But it is what a good teacher has always done, in the seventeenth, eighteenth, century, just that now they call it competencies (GI-NA1).

Officials within MoE emphasised the idea that the reform needed to continue the competency reforms. Moreover, they emphasised that competency-based education did not radically break with prior policy lines. As I discussed in the previous chapter, the 2006 competency-based curricular reform to secondary education generated resistance among teachers and intellectuals. Emphasising the continuity between curricular approaches, worked as a way to appropriate or 'Mexicanise' competency-based education, which can be seen as a way to answer to critiques of the global policies being imposed by international agencies.

5.1.4 Different tasks within MoE frame actors' room for manoeuvre

Although the MoE operated within similar positive discourses and imaginaries of competencies, the MoE was not a homogeneous organisation. There were differences in emphases, and there was struggle to define the meaning between different actors. For example, the education ministers had a more "outward look", that is, they were focussed on developments at the international scale and in other countries. This was illustrated by the development of the curricular standards, which were added in curriculum 2011, as I discussed in Chapter 4. For the development of these standards, the MoE had collaborated in 2007 with the Mexican Foundation of Businessmen for Basic Education (ExEb). Other business sector⁶⁶ and civil society actors, as well as the national

⁶⁶ Such as for example the civil society organisations COPARMEX, *Mexicanos Primero*, and *Fundación Azteca*.

teachers' union SNTE and the National Pedagogic University UPN also participated. However, in 2010, the MoE decided to enter into cooperation with the London Institute of Education (IoE), in order to have an "international reference" (SEP, 2011a, p. 14). Fieldtrips to the UK were undertaken, where they attended reunions with the London Institute of Education about the model of UK standards, the use of technologies, and conducted study trips to schools to define criteria for improving quality in Mexican schools. Eventually, these standards, rather than the standards developed with the ExEb, were incorporated in the final version of the curriculum.

Another example of the outward look is that the ministers emphasised the 21st century skills discourse, such as the need for ICT skills and English for all Mexicans. However, the Department of Curricular Development stressed the need to make indigenous language as the first language for indigenous communities, (and Spanish as L2, English as L3).

The different stances taken around competencies, can be explained because different roles are reproduced within the MoE, which reduced the perceived scope for action. The MoE staff assumed that the "political" decisions, that is, whether the curriculum was going to be competency-based, or whether English competencies were to be compulsory, were taken by the education ministers. A senior MoE official from the Department of Curricular Development argued that

[m]y scope for action is the academic aspect, the details of the approach. I cannot really go and sit down with the minister to discuss about his political choices, he does not have time for that (I-NA4).

In the particular Mexican context at the national scale, the teachers' union SNTE backed these political decisions in education. The Department of Curricular Development had to present its advances to SNTE. The MoE officials envisioned themselves as having to translate the broad education policy goals, as established by the education minister, the sub-secretary of basic education and the SNTE in the ACE and education sector programme, into concrete actions, rather than question them. For many, the translation was seen as a technical challenge, rather than a political question. Even those within the MoE who might

have doubted the development model that was embodied within the reform, their function as public servants prohibited them from questioning such things. One senior official's response to my question about if she felt this model could possibly lead to equal development for all Mexicans is illustrative of this:

That's the most difficult question of all. I do not agree entirely with the model, because there is so much inequality and injustice. If you go to communities in Oaxaca, people are still hungry. If you see this you cannot agree with the model, but I am a public servant. I try to do what they tell me, but inside I feel affected by the injustice (I-NA6).

This internalised view, that those within the ministry were not expected to question what fell outside the scope of their function, limited the room actors, at the national scale, perceived they had to question the reform.

5.1.5 Competencies accommodate indigenous education agenda

In Chapter 4, I explained that the curricular texts established a competency-based "curricular framework" and standards for indigenous education. The examination of the context of the text production suggests that the Department of Indigenous Education played an important role in the processes around the reform.

This was the first time that the Department of Indigenous Education participated in a national curricular reform. In 2008, a new Director took charge of the Department, by invitation of the sub-secretary of basic education. An essential factor played a role in facilitating the incorporation of indigenous voices in the text: The predecessor of the Director had been able to assure an increased budget for the indigenous education department. This meant that there were resources available for the states to develop educational material in indigenous languages, which empowered them, and at the same time allowed the Department to strengthen the institutional links with the Departments of Indigenous Education in the states. This, in turn, strengthened their negotiating position both at the national scale and with the education ministers of the states.

The Department, thus, was able to advocate and insert references to interculturality and diversity in Curriculum 2009. Indigenous education focussed on the reflection on the sociocultural application of the language, in contexts that are relevant to students' learning. It also placed an emphasis on the use of available resources. This fitted with constructivist approaches to competency-based education. Thus, for the MoE's Department of Indigenous Education, the policy idea competency-based education was adopted because it fitted the department's agenda, as it was able to function as a way to contextualise 21st century international demands, with local knowledge, needs and contexts of indigenous and migrant communities.

5.2 Controlling the meaning of competencies 'horizontally'

In this section, I further explore the politics of competencies by discussing case-studies of the struggle over its meaning between different education actors at the national scale during the processes of text writing of the reform trajectory. However, a focus on actors within the MoE alone does not evidence the struggles of actors outside the MoE and competency discourses that did not end up in the curricular texts. Therefore, in a third case-study, I discuss the experiences of education actors that, in their words, have been excluded from the processes around the curricular reform.

5.2.1 MoE versus IISUE: bureaucratic versus academic approach

In this first case study, I discuss the struggles of the Institute of Research about the University and Education (IISUE) of the National Autonomous University of Mexico (UNAM) to influence the meaning of competencies within the teacher

training courses⁶⁷ that accompanied the competency-based curricular reform during the first year.

The design of these courses by the IISUE was commissioned by the MoE. With the UNAM, the participation of “the highest academic house” (Ruiz Cuéllar, 2012, p. 58) was sought. According to the IISUE, this would not only provide academic legitimisation to the reform, but as the UNAM had been critical of competency-based approaches to education, this cooperation could possibly work to co-opt critique of the competency-based reform.

During the cooperation between the IISUE and the MoE, it became clear that they held different views of education and competencies. An academic from the institute commented as follows: “We were not on the same page, we did not share educational principles” (I-NA2), and another expressed that “[t]here was a clash of cultures” (I-NA10). A participant within the MoE's Department of Teacher Professional Development commented that “[i]t was very difficult; we were speaking different languages” (I-NA1).

To begin with, for the IISUE competency-based education did not have such a positive connotation as for the MoE. They argued the approach was still being developed, and they had doubts about its relevance for Mexico. Moreover, the institute believed that in order to develop a more ‘holistic’ vision of competencies, classrooms needed to be small, with enough materials, and teachers needed to be well-trained. Their approach to competency-based education clashed with the approach of the MoE as reflected in the curriculum. The MoE approach centred around the idea of expected learning outcomes that defined separate knowledge, skill, and value objectives. For the IISUE, this approach represented a neo-behaviourist interpretation of competencies, which they rejected.

⁶⁷ *Diplomados para maestros de educación primaria.*

As a university institute, the IISUE also envisioned a different idea of the teacher and teacher training. They proposed to work together with their academic peers in the state's public universities (UPN) and other teacher training institutes.⁶⁸ IISUE's teacher training proposal centred around an idea of the teacher as a professional and intellectual, able to pick and choose from the reform. It was based on the idea of encouraging the teacher to reflect on their practice, their local context and the Latin American context, and making them see the relevance of innovating and incorporating new concepts, such as competencies. But for the MoE, this was not a realistic view of teachers. They envisioned teachers as implementers of national policies. A researcher from the IISUE commented that "[t]he goal of the Department of Continuous Training was to sell the reform, to enthuse the teacher, and make them say: we accept the reform, because it is great, and good, and relevant" (I-NA2). For the IISUE, this approach was too directive:

The Department of Curricular Development would say: 'learn' this agreement rather than 'critically examine' this agreement. Their focus was not on assimilating and incorporating concepts and accommodating it in teacher's scenarios, but on knowing them and reproducing them (I-NA2).

And instead of working with the state universities, the MoE favoured a cascade teacher training strategy, whereby a group of MoE officials from the states would be trained at the national scale. They then would train groups back in their states, who would in turn train others. For the IISUE, this system led to dilution of information along the chain of the cascade: "It is like: I tell you, you tell five others, and those tell twenty others, and then we all know, but what those twenty know is not what I told you" (I-NA10). However, IISUE was not able to change this strategy:

We wanted to break with their strategy but we could not, because we were very naïve. The Ministries of Education in the states and their Departments of Teacher Professional Development told us: 'you do not cross this line, we have groups who take care of the training' (I-NA2).

⁶⁸ *Normales.*

The national teachers' union SNTE also played an important role in the reproduction of a vision of the teacher as implementer of the competency-based curriculum, rather than as a reflexive intellectual. A researcher from the IISUE commented that “[t]hey would say: take out this reading, the teacher will not understand it. So we had to add bold letters, bright colours and pictures” (I-NA10). In meetings the IISUE had with the MoE the teachers’ union SNTE would always be present. The role of the SNTE was of a political nature, that is, for the IISUE, the union made sure teachers would accept the reform and not question its relevance.

The view of evaluation of competencies of the IISUE also clashed with that of the MoE. The MoE proposed to evaluate competencies on the basis of academic Michael Scriven’s idea of evaluation as formative and summative diagnostics, which meant placing a focus on the outcome of learning, rather than on the process (Scriven, 1967). This understanding of evaluation placed an emphasis on qualifications. The IISUE proposed instead the idea of authentic evaluation, reflecting a view of evaluation as a pedagogical learning process. However, the MoE did not like this proposal and they were asked to rewrite the course on the basis of Scriven’s approach. The IISUE rewrote the module based on an approach which they called “evaluation for improvement approach” (YMCC) pointing out that this approach had its origins in Scriven’s formative evaluation approach. The accompanying exercise for teachers would be to elaborate an evaluation proposal based on this approach for maths and Spanish. However, the Friday before the Monday, when the final presentation of the proposal was scheduled, the MoE asked the IISUE to change the exercise and adapt it to the subjects civics and ethics.⁶⁹ The IISUE refused to change this over the weekend, as they had been told the module had been approved the week before.

Eventually, the course was published reflecting IISUEs competency evaluation proposal. However, parallel to the course, the MoE distributed their own document about evaluation of competencies. After the first course, the

⁶⁹ *Cívica y ética.*

participation of IISUE was terminated by the MoE, and the work was continued with another team from the UNAMs Science Faculty which, according to the IISUE, did not have any knowledge of education.

With this case study, I illustrated the complex struggles between the MoE and the academic institute the IISUE over the temporary settlement, that is, the interpretation or translation, of competency-based education in the teacher training course. I showed that the scope for participation for the IISUE was set by their invitation by the MoE. During the collaboration, the different views of the IISUE with regard to teacher training (academic rather than directive, regional vs cascade), competencies ('holistic' versus 'narrow'), and evaluation (as the outcome of a process rather than exams) clashed with the MoE's approach. The MoE exercised its power: the cascade strategy was implemented, the format of the course was adapted and eventually the cooperation with the IISUE was terminated. Throughout the process, the national teachers' union SNTE reinforced the approach of the MoE.

5.2.2 MoE versus UNESCO: economic versus education approach

The second case study looks at the participation of UNESCO Mexico in the processes around the 2009-2011 curricular reform, and their struggle to promote their interpretation of competency-based education, to further illustrate the politics over competencies at the national scale.

In the curricular documents of the curricular reform, UNESCO is presented as an important actor. As I discussed before, several documents published by UNESCO were mentioned as having influenced the reform. In 2009, UNESCO Mexico was invited together with the education faculty of the University Diego Portales in Chile to evaluate the curricular content, materials and teacher training strategy of the curricular reform. They also provided the MoE with the 'curricular tool box', which was developed by UNESCO's International Education office to assist governments with the development of new curriculums. In the

experience of UNESCO however, their participation was resituated by the MoE. One participant commented that “[o]f course, we are invited to participate within the boundaries that they allow, right?” (I-IN1). She continued arguing that,

[f]or example, there would be a big event, and they [MoE] would say: everybody participated: teachers, the UNAM, the union, UNESCO. But we had only been to that one event. So in reality we were not really key actors in the process (I-IN1).

The restriction of UNESCOs participation also took place on the level of influencing the approach to competencies and the definition of concepts in the reform. Within UNESCO, both human capital as well as human development discourses inform their approach or interpretation of competency-based education, as the following quote from one document in the curricular tool box illustrates:

Education systems must meet the challenges of the global market and the knowledge economy, but at the same time there is the need to build social cohesion and encourage local cultures to sustain a sense of identity (Operti & Murueta, 2010, p. 5).

Within UNESCO, the elements of living together, the practical application of knowledge, values and attitudes, as well as the importance of both global and local needs were emphasised. However, for UNESCO, the OECD had been more influential in the curricular reform than UNESCO. An actor within UNESCO commented that “[f]or UNESCO it is a bit sad that theoretical foundations and a real education discourse are missing from the reform” (I-IN1). First of all, because the OECD had been a more important interlocutor to the 2007-2012 administration than UNESCO through the writing of reports. In these reports a certain view of the reform was dominant:

For example, the OECD's ten recommendations to improve Mexican education is a good document, but I do not think it reflects the reality of the entire country. Rural schools and indigenous education are a bit left out (I-IN1).

For UNESCO, the MoE was strongly influenced by discourses that link education and the economy, promoted by the OECD, and the emphasis of the administration and the MoE on PISA and ENLACE, which was a

recommendation of the OECD, overshadowed the more 'holistic' competency discourse in the hybrid policy text:

One of the main objectives during this administration was to improve the scores on PISA and ENLACE. I think this was a fundamental mistake which has caused a lot of tension in the development of the reform, because on the one hand you have the discourse of competencies, and values and such, and on the other hand you have standardised tests. This is a fundamental issue because ENLACE is not measuring all those aspects that the reform does have. For example, ENLACE does not measure gender and diversity, topics which the departments of Indigenous Education and Special Education have made so much effort to include in the reform (I-IN1).

In their final evaluation of the curricular reform processes, UNESCO also concluded that the cascade training strategy to implement the reform led to diffusion and confusion with regard to competency-based education among teachers. However, this study was never published by the MoE, which according to UNESCO was related to the content of the report.⁷⁰

In this case study, the curricular documents of the reform presented UNESCO as an important participant, however their participation was constrained by the national MoE. The MoE exerted its power by framing the boundaries of participation, but also the economic discourse of the OECD was more influential. In this way, a competency approach as standardised scores on tests (PISA, ENLACE) informed by a human capital approach was reproduced within the 2009-2011 reform at the national scale. This was instead of a more humanistic version emphasising difficult measurable aspects such as values (gender, interculturality) and attitudes, informed by an idea of education as intrinsically valuable.

⁷⁰ Although on both the websites of the University Diego Portales and UNESCO the conclusion of the study is mentioned, on both websites the links to the study is empty. I obtained the reports through UNESCO.

5.2.3 MoE versus CNTE: neoliberal versus socialist approach

This last case study illustrates the struggle to influence the meaning of competencies in the processes of competency policy making by those outside the policy processes.

At the national scale, a strand of discourse could be found that was critical of the idea of competencies, and rejected the competency-based curricular reform. The critique was mainly articulated by the national section of the dissident teachers' union CNTE, and various education researchers. The rejection of the curricular reform resided in the meaning of the competency concept, which partly acquired meaning as part of the ACE. The dissident teachers' union CNTE represented competencies as measurable behaviouristic objectives which are aligned with the needs of the labour market. For them, competency education was imposed on Mexico by international financial organisations, and the reform was not developed in a participatory way, which led the dominance of neoliberal economic imaginaries in the reform. The ACE was associated with the political party PAN, which was a party different to the left-of centre parties such as the PRD to which most CNTE activists were affiliated. For critics, the ACE policy ensemble was,

[y]et another reiteration of the constituent elements of a neoliberal project that has dragged on fruitlessly for years, and whose central element, quality, although it appears obsessively and repetitiously in all [education] programmes, merely certifies the constant and repeated failure of tests applied in order to reach it as well as the deep and growing educational inequality (Coll Lebedeff, 2009, p. 39).

The competency-based curricular reform acquired meaning because it was part of this condemned policy package. Equally, Marin (2011: 3-4) critiqued the imaginary of the knowledge economy that provided competency-based education with meaning in the Mexican case in the following manner:

Competency-based education the spearhead of culturally imperialist geopolitics, in order to observe the world through the eyes of the other, the dominator, under the baton of the knowledge economy [...]. Its language is not neutral, but shows an ideological stance and intentionality. Competency-based education is intended as a single

thought, sat on the throne of regulations so that others have to abide by its guidelines, which is an assault on intelligence to those who explore other curricular paths. It insists on school assessments and socially useful schools, only in terms of the results obtained by standardised tests, ENLACE and PISA, it refutes the essential and historical sense of schooling focused on the transformation of knowledge and those involved in its development.

An important critique of competencies was that it represented business interests over the interest of rural and subaltern Mexicans.

Moreover, although the ACE was presented as an Alliance, the CNTE argued that the pact really was an agreement between the national government, and particularly president Calderon, and the teachers' union SNTE. The dissident teachers' union CNTE accused the teachers' union SNTE of 'kidnapping' the national MoE.

The CNTE refuted the idea that competency approaches were developed in a more suitable way for education in the curricular reform, because,

[i]t does not matter what it could possibly mean, the point is that if you specify expected learning outcomes and couple it with standardised evaluation mechanisms and reduction of resources this is what it means (I-NA12).

According to Coll Lebedeff (2009) the ACE was received sceptically by well-known Mexican education actors such as the civil society organisation Mexican Education Research Council (COMIE),⁷¹ the Department of Education Research of the cinvestav of the National Polytechnic Institute (Mexico's most prestigious technical university), and even the National Institute for Educational Evaluation (INEE). Both researchers from the National Polytechnic Institute and the UNAM demanded the suspension of the curricular reform on the basis that it had been designed in a short period of time, and was motivated by political interests of the national government and SNTE rather than pedagogical issues. The researchers point out that the competency-based curricular approach still subject to intense international debate and "involves teaching and learning for

⁷¹ See also www.comie.org.mx

which there seems to be no provision challenges" (Avilés, 2 September 2008). Also, they pointed to the disarticulated coordination of development of the reform and materials. In addition, the researchers argue that the development of a national curriculum of primary education needed to consider the sociocultural diversity of the country, where there are rural, migrant and multi-year schools, and that the announced reform would "exacerbate rather than address this central problem" (Avilés, 2 September 2008).

However, the MoE and SNTE responded by declaring the reform would continue. The MoE argued that the CNTE conflated the idea of a narrow approach to competencies with the way in which it is developed in the curricular reform, and they dismiss the rejection of the CNTE and academics as "standard rejection to education policy" (I-NA8). This de-legitimised their critique of the Mexican competency-based curricular reform. Moreover, these competency discourses were shut out of the MoE, because they argued that the CNTE operated outside normativity:

You have to realise we have normativity: by law the development of the curriculum is national. The states have to take care of the administrative process of the reform, but there is a difference in ability between the northern and southern states. Michoacan is a clear example, they have a governance problem, they give in to unreasonable demands because they want to keep them calm (GI-NA1).

The national MoE accused the dissident CNTE of holding the southern states' MoE hostage.

However, there were different spaces at the national scale in which these critical competency discourses were articulated and enacted. The critics of the reform actively sought to link the signifier competency with the idea of competition and human capital approach, such as formulated by Theodore Schultz and Gary Becker (cf. Coll Lebedeff, 2009). In the case of academics and intellectuals this was done through communication of their explanation of competency-based education and the curricular reform in national media, such as *la Jornada* and *el Proceso*. Also, academics within the UNAM organised several conferences that discussed the ACE and the competency reform, and wrote several books about

the topic. Rejection of the curricular reform by the dissident teachers' union CNTE was also enacted at the national scale in the form of marches by the different chapters of the CNTE (Hernández Navarro, 4 February 2012). For example, in February 2012 35,000 teachers coming from 25 out of 31 states gathered in Mexico's capital to demand the cancellation of the ACE. Since its signing in 2008, the ACE and the policies proposed by it have been resisted in Morelos, Oaxaca, Michoacan, Quintana Roo, Guerrero, where the CNTE was dominant.

In addition, throughout the country there have been discourses and practices that claimed to be anti-neoliberal alternative education proposals (see also Street, 2003, p. 181). During a seminar on the reform, organised by the CNTE in Mexico City, it was stated that,

[t]he aim is to support the articulation of a broad pedagogical cultural front, that resists and blocks neo-liberal policies through the critique-preparation-construction of education proposals that are congruent with the needs and interests of the population, in order to 'mexicanise' Mexico.⁷²

There was a fundamental ideological disagreement about the educational needs and interests of Mexicans and accordingly the definition of quality education and how this should be derived. Alternative proposals are distinguished through the use of words such as 'alternative', 'relevant', 'participatory', 'holistic'⁷³, and 'humanist'.

The critical competency-discourse of the CNTE drew on socialist imaginaries and had not been able to influence the MoE at the national scale as they were delegitimised by the MoE. However, I argue in following chapters that this discourse influenced the processes around the reform at the state and school scales.

⁷² Information retrieved in January 2012 from:

<http://cntrabajadoresdelaeducacion.blogspot.com/search/label/educación%20básica>

⁷³ In Spanish '*integral*'.

5.3 Controlling the meaning of competency based education 'vertically'

In this section, I discuss some of the ways the MoE controlled the trajectory of competencies 'vertically', that is, vis-à-vis the state and school scales.

5.3.1 Delegitimising resistance

After the first draft of the curriculum was written, the national MoE, together with the state MoEs, started to pilot the reform in a selected number of schools in the different Mexican states. During these processes, the MoE was sometimes confronted with rejection of the idea of competencies, and interpretations of the approach as favouring competition and neoliberal connotations, in line with the critique of the CNTE as described above. An academic from the IISUE recalled:

The problem with mentioning competencies in Mexico is that it is incendiary, because competencies were identified with competitiveness, and perceived as training for work. Competencies were linked to international organisations, similar to the word quality, and there was a very unwelcoming view of international organisations (I-NA2).

During trainings teachers also questioned whether reforming curriculums on the basis of complex competency-based approaches was the best way to improve the quality of education. Instead, for teachers, improving the quality of education was first and foremost related to dealing with conditions of structural inequality. However, rather than being taken seriously, these voices and representations of competencies were rejected as uninformed, and as such de-politicised, by those in charge of the curricular reform. The following quote illustrates this:

When we started to talk about competencies this would cause uproar and teachers would reject it from the start, without listening. But their conception was misguided, they thought competencies were about competition, because they linked to it to factories, to companies, and neoliberalism (I-NA1).

Within this conception, 'misguided' teachers were perceived as the problem, rather than the competency reform, and the perception of the solution was thus to focus on teacher training:

The competency approach has been the Achilles heel of the reform. But I think that's fairly manageable, I mean, if you sit teachers down and you really teach them the principles of the reform and you give them a theoretical and methodological foundation of the pedagogical process it would be much more acceptable (I-IN1).

The design of the reform itself, remained unquestioned. Contextual factors that might obstruct the possibility of the teacher to develop complex competencies in students were not seen as structural design flaws of the reform:

I think that if teachers really focus on developing those competencies for life, we will improve as a country. I do not think the reform is mistaken, I think it is the right course of action, but of course in order to achieve it there are a thousand intervening factors (I-NA1).

However, training sessions were long, consisting of several days with many speakers, and training was directive rather than focussed on questioning the meaning and/or applicability of the reform. Ironically, the trainings themselves seemed to do little to enhance the competency of the teachers. The cascade model has also been critiqued as a training model, given that "by the time that teachers receive instruction, many of the information has been lost, given its appropriation by different agents" (Ruiz Cuéllar, 2012, p. 56). It could be argued that this approach to training was intended as a way to depoliticise possible critique, rather than the transformation of teachers' concepts and practices.

5.3.2 The power of words

In Chapter 4, I argued that in the curricular texts the approach that is favoured is 'for the development of competencies', rather than 'competency based'. An exploration of the political context of the development of the production of the text reveals that the difference in words might have been a strategic decision to deal with the highly political nature of the term competencies, which in Spanish

can also mean competition. The emphasis is made that there is a key difference between a 'competency-based reform', and a 'reform that favours the development of competencies', because whereas "the first approach can become an empty discourse, in the latter approach you really have to ask yourself which competencies you want to develop and how you are going to do that" (I-NA4). A senior official from the Department of Teacher Professional Development explains her understanding of the difference in the specific Mexican approach as follows:

It is something that [senior MoE official] always mentions, she said: we are not working with 'the competency-based approach' which would be different, right? [...] The idea that they have tried to communicate in the programmes is the idea that the teacher first has to have his own competencies to teach. But not like before, it is now more like facilitating, and the student will construct them, he is the protagonist of the learning. So the teacher has to facilitate the competencies so that the student can use everything he learns for solving problems, and will be able to respond to what he is presented with in daily life (I-NA1).

In the educational material that was published from 2011 onwards, the term 'for the development of competencies' is reflected, for example in the Manual to promote the development of reading and writing competencies (SEB/SNTE/OEI, 2011).

One senior MoE official recalled that,

[w]hen they started to talk about competencies, there was a lot of turmoil and teachers initially rejected it. Because it was a poorly understood term, when they talked about competencies, they thought competition. Added to that there was the association with factories, business. In the beginning, the first books we read about the term had to do with that meaning, with the Japanese model. So I think this is why we started to talk about the idea of developing competencies in children so that they are able to deal with life (I-NA4).

The teacher training course that was part of the reform stipulates that,

The competency-based approach has nothing to do with being competitive, but with the ability to retrieve knowledge and experiences, learn in teams, achieving adequate and enriching interaction with others, and the social and ecological context (SEP, 2009, p. 11).

Also, in the course, the term 'UNESCO' was mentioned nineteen times, whereas 'OECD' was only mentioned once. This can be explained as an attempt by the MoE to disassociate competency-based education in the curricular reform from the OECD due to the distaste that education actors, such as the dissident teachers' union CNTE, had for global influences of global (financial) organisations on the model.

All the respondents at the national scale mentioned the Swiss educationalist Perrenoud as an important intellectual reference to the competency approach in the reform:

I remember that when I started working here six years ago, the first thing my boss did was give me Perrenoud's book, he told me: you have to read this book. And I read it, it was almost like the bible back then (GI-NA1).

Throughout the curricular reform, the work of Perrenoud was used as what can be called an authoritative text, to communicate the idea of "developing competencies for life" (I-NA6). Teachers in the different states all referenced Perrenoud as an authoritative source with regard to competencies, as I discuss in Chapters 6 and 7 from the states' and teachers' perspectives. Perrenoud is critical of checklist approaches to competency-based education, and he proposes an approach that focusses on the promotion of developing contextually relevant life skills, which is an approach that is theoretically more 'holistic' than a 'narrow' behaviourist skills-based approach (Perrenoud, 2005). This is another way in which the MoE tried to control the meaning of competencies in the reform.

Another example also illustrates the importance of Perrenoud's work to communicate the competency idea in the curricular reform. During the development of the teacher training strategy, the IISUE asked the Department of Continuous Training whether there would be a teacher manual⁷⁴, which had been an important tool for teachers to understand main concepts in curricular

⁷⁴ *Libro de maestro.*

reforms in the past. According to an academic from the IISUE, the response from the MoE was that,

[i]f you want to replace it with something, replace it with Perrenoud's book about developing competencies in the classroom (I-NA2).

A last example illustrates the importance of the right use of words in controlling the meaning of competencies for education. During the processes of the reform, the national MoE trained teachers in states in which the reform was opposed at the state scale, for example in Michoacan and Oaxaca. The MoE recalled that they had to find creative ways to give the trainings. For example, during one training in Oaxaca, they had to make sure to explain the competency reform in a way that would resonate with local understandings and education ideas, as one official in the MoE explained:

We were invited by the APPO⁷⁵ to present the curricular reform in an assembly where they were going to decide whether they could accept it. Before we arrived, they had told us: you only talk about academic issues, point out the positive things about the reform, but nothing related to the ACE or anything. We were allowed to mention the term competencies, but as long as we used it in the sense of the approach of developing the abilities and possibilities of the human being. So then we arrived at this place filled with thousands of teachers. It was all quite nerve-racking (I-NA1).

The training of teachers focussed on the communication of the meaning of competencies as life skills and related to human development, and disassociated from the ACE.

5.3.3 Steering competencies from a distance

In the discussion of the translation or temporary settlement of competency-based education in the curricular texts, I argued that within the hybrid texts,

⁷⁵ APPO is the Popular Assembly of the Peoples of Oaxaca, which is made up of government and social organisations, importantly the dissident teachers' union CNTE, and has governed Oaxaca in practice since 2006.

competency discourses that favour a life skills approach and emphasised diversity, interculturality and gender could be distinguished. At the same time, the development of large numbers of competency standards favoured a more 'narrow' task-based approach to competencies.

The possible rich meaning of competencies as for life, diversity, interculturality and gender, was further reduced by other policies in the policy ensemble (ACE). The 2006-2012 administration placed a strong focus on the standardised test ENLACE.⁷⁶ However, it is questionable whether the development and application in practice of competencies interpreted as a complex set of knowledge, skills and values, can be tested by a standardised pen and paper test. ENLACE focussed on de-contextualised reduced aspects of the curriculum. Its multiple choice questions promoted passivity rather than the search and formulation of answers to questions, and it emphasised memorisation, rather than the understanding of social and natural phenomena (Aboites, 2009). ENLACE did not measure the development of intercultural or gender awareness competencies. This definition of competencies thus contradicted the more 'holistic' discourses in actors' representations, as well as the curricular texts at the national scale.

5.4 Conclusions

In this chapter, I have analysed the politics of competencies by discussing the struggle between different education actors to influence their meaning in the processes around the 2009-2011 competency-based curricular reform to primary education. I have discussed these processes within the specific Mexican context at the national scale of the policy trajectory, in order to further understand the ways in which education reforms that draw on global policy ideas are re-contextualised in Mexico. Through an in-depth discussion of the

⁷⁶ Mexican National Exam of Academic Achievement in Schools.

minutia of the policy processes, I have been able to answer how actors at the national scale interpreted, represented, transformed and contested the reform by drawing on different competency-discourses and imaginaries, and which were excluded.

I have demonstrated that the policy idea of competency-based education was adopted at the national scale within the MoE because it fitted (and was made to fit) both with their imaginaries and agendas (such as increasing scores on PISA, economic growth, 21st century skills, diversity agenda of indigenous education). Rather than being 'imposed', competency-based education was adopted, and adapted, because it accommodated both perceived global and national agendas, as well as different national agendas. For the MoE competencies has a positive meaning, as a complex set of knowledge, skills and attitudes, as part of a learner-centred pedagogy, and as being able to facilitate the entry of Mexicans into the workforce. It was emphasised that competencies were a positive development, and that they were not related to competition. Competencies thus became part of an 'emotional economy', which led to its adoption (or continuation). The MoE also emphasised the continuity with prior Mexican curricular reforms, in an attempt to 'Mexicanise', that is, claim ownership of the reform, and facilitate the feelings of nationalism vis-a-vis the reform, which worked as a way to contradict resistance to the competency-based curricular reform.

I also illustrated the 'tug of war' between different approaches to competency education 'horizontally' (between different actors at the national scale) through the discussion of three case studies. While the MoE emphasised the participatory nature of the reform by allowing different institutions (IISUE, UNESCO) to participate, the MoE played a dominant role as key interpreter in the definition of the competency-based curriculum at the national scale. This role was reinforced by the teachers' union SNTE. This led to an emphasis on directive teacher training, which focussed on acceptance rather than critical reflection of the competency-based curricular reform. The overall goals of the reform were very much guided by the aims of the OECD, which promoted an

approach that subjected education reforms to the needs of the economy, rather than on the basis of education theory (as promoted by UNESCO). By looking at education actors who, in their words, did not participate in the curricular reform processes, I was able to argue how an association of competencies with neoliberal competition was kept out of the reform at the national scale.

The MoE tried to control the meaning of competencies 'vertically' towards the state and school scales, as competencies for education, and it tried to disassociate the association with the idea of competition, through the use of specific words (UNESCO instead of OECD) and emphasising Perrenoud as an intellectual reference to competency-based education in the curricular reform. Teachers who had divergent meanings of competencies, for example those who doubted whether this would improve the quality of education, were considered to be 'uninformed', and an obstacle for increasing the quality of education. It was argued by the MoE that if only the 'true meaning' of competency-based education could be better communicated, there would be no resistance. Lastly, critique of the curricular reform was delegitimised by the MoE, by perceiving the dissident teachers' union CNTE - who, among other things, voiced critique of the reform on the basis that competencies were neoliberal behaviouristic skills - as illegitimate. These examples together evidence the "ideological work" (Apple, 2008, p. XI) that the MoE undertook to shift the meaning of the floating signifier competencies within the reform in order to obtain their aims (such as complying with international and national agendas and minimising resistance).

But despite the emphasis of the MoE to promote a 'holistic' competency discourse (disassociating competencies from competition, emphasising less measurable aspects such as life skills, and the development of broad competencies such as gender and diversity) the coupling of the approach at the national scale with evaluation of standardised content aimed to steer/control the meaning of the approach as a 'narrow' one, focussed on task analysis at the state and school scales. Thus, while on a discursive level (in the curricular texts, and in the way the MoE talked about the reform) a 'holistic' approach was promoted, in practice, a more 'narrow' approach was enacted, with the aim of

increasing scores on the standardised tests PISA and ENLACE. (I elaborate on the 'narrow' enactment in Chapter 7.)

In the next chapter, I further discuss the processes of re-contextualisation of the competency-based curricular reform, by looking at its interpretations and enactments at the state scale of the trajectory in Michoacan and Durango.

Chapter 6. Re-contextualising competencies at the state scale

The trajectories of global policy ideas such as competency-based education are transformed as they are interpreted and enacted in different sub-national contexts. In this chapter, I continue to examine the re-contextualization of the 2009-2011 competency-based curricular reform to primary education, by discussing the struggle between different education actors to influence its meaning. In this chapter, I discuss these processes within the specific political contexts at the state scales of Michoacan and Durango. I discuss how the existence of different competency discourses can be understood within the different historical, political, economic and education contexts of these two states. The groups of actors that are discussed in this chapter, are those that played an important role in the reform in so far as their voices and ideas of competencies were reflected in the reform processes. I also researched actors at the state scale who claimed that their competency discourses were not included in the reform, in order to further understand capacity - or the room of manoeuvre - of different education actors to reproduce and reinterpret the meaning of competencies.

In Section 6.1, I describe the political context to education, focusing particularly on the complex configuration of education actors and discourses in Michoacan and Durango. Then, in Section 6.2, I discuss how the different actors in these states represented the competency-based reform. In Section 6.3, I discuss how the political situation of education described in 6.1 shaped the processes of piloting and implementing of the competency-based curricular reform between 2007-2012. I focus on the struggles over influencing the meaning of the competency reform, and the spaces for participation in the definition of the writing of the curricular texts at the national scale. Then, in Section 6.4, I discuss the different ways in which the reform was contested within both states. Lastly, in Section 6.5, I draw some conclusions with regard to the politics of the re-contextualisation of the curricular reform at the state scales.

6.1 The political context for education at the state scale

6.1.1 Unfavourable political context to national education reforms in Michoacan

The political education context at the Michoacan state scale in which the competency-based curricular reform was received was made up of a complex configuration of education actors and discourses, which can be divided into three time periods that have shaped the reform processes.

The first period was characterised by a political context for education at the state scale that was opposed to national education reforms. In the summer of 2008, when the Mexican states were called to start piloting the curricular reform, Michoacan was headed by the Party of the Democratic Revolution (PRD), which was different to the party that was in power at the national scale.⁷⁷ The left of centre PRD (Ornelas, 2004, p. 401) proposed for basic universal education; participatory and pluri-cultural public education; free public, compulsory and quality education; education for work and life; the integral reorganisation of education; and the promotion of social sports culture (Gobierno de Michoacan, 2008).

During this first period, an important role was played by the teachers' union. Whereas in most Mexican states the teachers' union SNTE (which is generally aligned with national education policies) was dominant, in Michoacan, the dissident current CNTE⁷⁸ dominated the state's union congress. The CNTE drew on left-wing and Marxist imaginaries (throwing over State power) as well as imaginaries of popular or radical democracy (Street, 2003, p. 180), and most of the leadership of the union was affiliated to one of Michoacan's left-wing parties.⁷⁹ The CNTE was historically opposed to national education reforms.

⁷⁷ Namely, the National Action Party (PAN).

⁷⁸ In Michoacan, the dissident teachers' union CNTE goes by different names: 'teachers in resistance', 'democratic teacher movement', 'dissidence', 'the democratic XVIII chapter', and 'the democratic ones'. The CNTE refers to the teachers' union SNTE - which is the biggest at the national scale but has little support in Michoacan - as the 'institutional union' or 'the institutional ones', or the 'charros'.

⁷⁹ PRD, PT, Morena, Convergencia.

Central to the union's struggle over education in the state were imaginaries of "the education we want, for the society we want" (I-ST54). Although there were no official data about affiliation percentages, around the time the curricular reform was enacted in Michoacan, my respondents estimated that around eighty per cent of its teachers were affiliated to the CNTE.

During the first period, the CNTE exerted dominant political influence over the administration and the MoE, supported by a large number of affiliates and capacity to mobilise. It had been able to convince the administration not to sign the national education policy package Alliance for Quality Education (ACE) which the competency reform was part of, on the basis that it had been undemocratically agreed upon (between the national MoE and the SNTE); that it represented business interests; that it subscribed to a neoliberal education project; that it had not consulted teachers; and that it was linked to evaluation, which does not take into account the contexts and needs of every school and therefore put all the blame for the lack of quality on teachers and would eventually lead to the erosion of teachers' rights. The failure to sign the ACE led to a reduction in the national resources available to develop the competency-based curricular reform.

However, whereas the CNTE had been able to prevent the signing of the ACE, the MoE and teachers' unions vehemently disagreed about labour issues. The CNTE responded with strikes and occupations of MoE buildings and marches.

At the same time, the teachers' union SNTE supported national education policies during this first period because they fitted with their idea of quality education. However, the SNTE had few affiliates in Michoacan, and therefore little traction within the MoE.

Within this context, a team in charge of implementing the reform - the Coordinators of Advice and Follow-up⁸⁰ (CEAS) - was tasked with the implementation of the reform, as I discuss in Section 6.3.

The second period in the political context for education in Michoacan began, when after a seventeen months' strike by the CNTE, the PRD administration appointed a new education minister in July 2009. Her team was also critical of national education reforms and drew on leftist and socialist imaginaries, arguing that the national competency-based reform had been part of the dominant education ideology since the 1990s. However, because of the new education minister's personal connection to the leadership of the CNTE, the MoE and CNTE agreed not to obstruct the implementation of the reform in schools that wanted to implement it.

The third period in the political context for education at the Michoacan state, started in 2012 when the political colour of Michoacan's administration changed to the Institutional Revolutionary Party (PRI), which by that time had also been re-elected at the national scale. The new state administration was open to national education reforms, and adopted the discourse of a need for competency-based curricular reform in light of the knowledge society (Gobierno de Michoacan, 2012). Agreements were signed with the federation to implement the competency-based curricular reform, and strategies were designed to support the development of competencies in primary education. In line with the aims of the national administration, the priority of the Michoacan government was to "recover the leadership of education" (Gobierno de Michoacan, 2012, p. 8). It opposed the CNTE, arguing that "due to the actions of different pressure groups, which imposed their economic, political and cultural interests" (Gobierno de Michoacan, 2012, p. 8), Michoacan's education institutions had not been able to do their work. In response, the CNTE, increased its protests and strikes. This third period in political context was characterised by a support

⁸⁰ *Coordinación Estatal de Asesoría y Seguimiento en Educación Primaria.*

from the state MoE to implement national education reforms together with the SNTE (see Image 2), and a repression of the CNTE.

Image 2: The governor of Michoacan Fausto Vallejo Figueroa from the PRI (right) shakes hands with Mexican president Enrique Peña Nieto, during the signing of education reforms. 3 December 2013



Source: Retrieved in January 2015 from <http://www.atiempo.mx/estado/firma-fausto-vallejo-convenio-para-implementar-reforma-educativa/>

6.1.2 A political context favourable to national education reforms in Durango

In Durango, the competency-based curricular reform was received in an education political context that had been historically aligned with national education policies, and drew on much of the same imaginaries about a global knowledge society. Durango was governed by the PRI. The state MoE was embedded in an education quality discourse that linked the terms quality, competency and productivity. The education discourse was aligned with the national education programme, and centred around the idea that “quality of learning (...), according to the demands of a new local, national and global reality in order to move towards a higher quality education with equity, based on human values” (SEED, 2005, 2007, 2009). With regard to basic education, the focus was on maths, Spanish, English, ICT skills, social participation and the

development of moral values. The participation in ENLACE and PISA for the improvement of education quality was emphasised.

In Durango too, a CEAS team was formed and placed in charge of implementing the curricular reform. This team had been in charge of prior competency-based curricular reform to secondary education too, and was supportive of competency education.

The MoE expressed its openness towards the national education policy package (ACE), as the following quote by a senior official who argued that “the curricular reform is welcome in Durango” (I-ST11) shows. The good working relationship between the state MoE and the national MoE was often reiterated by senior officials. In addition to the openness to international and national reforms, the education political context in Durango was characterised by an alliance between the MoE and the teachers' union SNTE. The leadership of the union supported the implementation of the curricular reform, and only manifested itself with regard to labour issues. The MoE emphasised that the leadership of the reform and pedagogical issues were in their hands, and they denied the existence of opposition to the reform. The dissident teachers' union CNTE had little presence in Durango (about 1.000 teachers) and participated for issues of labour rather than pedagogy. The only group that rejected the national education reform was the social movement COCOPO, which I discuss in more detail in Sub-section 6.4.2.

6.2 Representations of the competency-based curricular reform at the state scales

The curricular reform was interpreted within and shaped by the political context to education at the state scale describe above. It was also interpreted in a context where little information was initially provided about competency-based education, what it was, and how it was supposed to be taught. In this section, I discuss the different ways in which the competency-based curricular reform was represented at the state scale, first in Michoacan, and then in Durango. Different

interpretations of competencies and the competency-based curricular reform can be distinguished on the basis of actors' representation of: 1. the competencies concept (integrated set of knowledge, skills and attitudes/values versus skills, positive/negative connotation); 2. the context of influence and text writing of the reform (dominant imaginaries/views/interests, participatory nature); and 3. the context of practice (relevancy, need for alternative curricular reform, possible effects).

6.2.1 Michoacan: competencies as 'the Trojan horse of neoliberalism'

In Michoacan, the vacuum of knowledge about the reform and competency-based education (CBE) created space for the dissident teachers' union CNTE to play a role as "key interpreter" (Ball, 1994) to influence the meaning of competencies. As I explained above, the CNTE opposed national education policy, and drew on socialist and Marxist socio-economic imaginaries. Competencies acquired meaning within the embedded representation of the education project of the federation as described above. However, the critique of the CNTE against competency education specifically was emerging at the time of research.⁸¹

For the CNTE, competencies in the education reform meant skills, and competition, which had negative connotations. There was some disagreement between those who saw competencies as inherently bad, and those that argued that the term competencies could mean different things, depending on which social and economic imaginaries it draws on and how it is operationalised. One senior activist with the CNTE argued that,

[f]or example, Paulo Freire, the Cubans, and even Chomsky, also talk about competencies, but in a different context. For me the problem is not with the concept (I-ST14)

⁸¹ At the time of research, I was told of the existence of a pedagogical critique of the competency reform by a group of academic advisors of the CNTE. However, despite insistence for a copy, I was not able to verify its existence.

However, they agreed that in the curricular reform, this was not how competencies were interpreted:

The problem is that the shrewd pragmatic bourgeoisie takes a fashionable term such as competencies and they give it a specific use. They link it to competition. They interpret it in a way that you have to demonstrate the set of knowledge, abilities, skills, values because you have to apply it in the world of work. That's the utilitarian use of competencies; for work and economic competitiveness. This is how a possibly rich concept is reduced and given an instrumental meaning (I-ST40).

The problem is the specification of expected learning outcomes, which are measurable contents. But a competency has many elements which are not measurable, so the whole competencies discourse disappears in practice. What is translated of competencies is: to become competent to level five of the OECD. So the OECD is the main objective, not the formative process (I-ST57).

For the CNTE, the competency-based reform was undemocratically imposed by international financial organisations such as the International Monetary Fund (IMF), World Bank (WB) and the OECD, which, together with the SNTE had 'colonised' the MoE. The competency-based curriculum therefore embodied the neoliberal imaginaries of the national MoE:

If our education and competencies are dictated by nation states that reflect the interests of dominant classes, you can safely say that the competencies that are promoted are those that are of interest to the dominant classes to sustain their productive mechanisms based on exploitation and social consensus for hegemonic thought (Isch L. 2011: 7).

The competency approach is guided by neoliberal ideology, and the role of the school is to respond to the needs of the market (Isch L. 2011: 6).

An often heard critique of the CNTE of competency-based education was that competencies were the "'Trojan horse' of the neoliberal approach to education" (I-ST29). The reform was not perceived as relevant to Mexican people and their contexts. Elements of Michoacan's infrastructure and teacher training, were perceived as not conducive to the reform. For the CNTE, the reform drew on approaches that reduced the role of teachers to that of trainers and facilitators, rather than popular educators with a pedagogical, epistemological, ethical,

philosophical and political profiles. There was a concern that the focus on English as a second language, ICT skills, and standardization of content on the basis of competencies would lead to a loss of Mexican cultural heritage:

Competency education lacks attention for local and national particularities, which are subjected to the interests of business, which are in turn guided by transnationals without consideration for the ethnic and cultural characteristics of countries (IschL. 2011: 7).

As I described in Sub-section 6.1.1, the powerful position of the CNTE in Michoacan can be explained by the high number of affiliates. This offered the CNTE a bargaining position in negotiations with the MoE. The union was able to prevent the training in the reform and control sources of information. They were able to function as key interpreter, in that they were able to define the meaning of competencies and representation of the competency reform at the state scale.

The role of CNTE as key interpreter is evidenced because the representation of the competency reform of the MoE echoed much of the discourse of the CNTE. For example, during the first two periods, the MoE disagreed with the neoliberal national project that sustained the competency reform, which according to them did not fit Mexico's structural conditions of inequality. One senior official said that "[i]t might work in Aguascalientes, or Chihuahua, but not here" (I-ST31). A former education minister explained that,

[t]he problem is the neoclassical or neoliberal conception of the economy, the development model, which is based on the idea that we are all rational individual decision makers and does not envisage the social pact nor State intervention (I-ST8).

Within the MoE, the idea existed that the IMF had made Mexico sign the competency-reforms. However, the meaning of competencies within the MoE during the second period differed from that in the first period. The education minister during the second period was of the opinion that they had to implement the reform as it was legal and because teachers needed to work with something. Also, the former education minister argued that "the competency approach in itself is not so evil as some groups liked to portray it" (I-ST8). She

argued that as long as it would be implemented under the right conditions, competency-based approaches to education could possibly be beneficial to Mexican education. In this sense, the MoE thought of competencies as a floating signifier, which meaning would be defined and shaped by its application in practice. This reduced the negative view of the competency-based curricular reform. The MoE during the third period adopted similar positive competency discourses as the national MoE and SNTE.

For the team in charge of implementing the reform in Michoacan - the CEAS - competencies had a generally positive connotation and were about "being competent, being able, having knowledge, being able to function in your environment applying that and using all available resources" (I-ST51). It was not associated with competition, as the following quote illustrates:

I do not know where they [CNTE] acquired the idea that competencies mean competition, but this discourse has alienated most of the teachers from the reform. Competencies is not about making children compete, we have explained it to them thousands of times (I-ST13).

The CEAS argued that the curricular reform embodied a Mexican version of competency-based education, which was 'education for the development of competences'; an approach that was promoted at the national scale in order to move away from the idea of competencies as competitiveness. A CEAS team member explained that,

[t]eachers were telling us: We do not want the reform because it is 'competency-based'.⁸² But no, the reform is: 'for the development of competencies'.⁸³ These are two very different models. 'For the development of competencies' is the Mexican version, because in other countries it is 'competency-based' (I-ST22).

For the CEAS, the competency-reform embodied problem-solving and learner-centred approach. They also referenced Perrenoud as the intellectual influence to the idea of competencies in the reform, whose texts had been promoted by

⁸² *Por competencia.*

⁸³ *Para el desarrollo de competencias.*

the national MoE. As opposed to the CNTE, the CEAS argued that the competency-based reform would develop critical and analytical capacity in children, which would prevent them from being led by consumerism.

Furthermore, they argued that the way competencies were developed in the curricular reform was flexible enough to be adopted by teachers in ways that are relevant to their specific contexts:

The reform provides you with the content you have to develop, the expected learning outcomes, and the graduate profile, but it does not tell you how to do this. Teachers can adapt and contextualise the reform. If your context involves beans, you can use beans (I-ST51).

For the smaller teachers' union SNTE, competency did acquire the meaning of competition, but this was not seen as a problem. As one former leader of the union explained, a competency "is that students can solve their problems, that they can compete with others to obtain a job, and that as Mexico we will be able to compete in the world" (I-ST35). Like the MoE and the dissident CNTE, the SNTE believed that competency-approaches originated outside Mexico, either from international institutions or other countries. Some argued the Mexican competency reform was a copy of either the Venezuelan or the Chilean curricular reform. However, these origins did not represent a problem, as the perceived socio-economic imaginaries that framed the meaning of the competency reform resonated with the social imaginaries of the union:

We live in a context of globalisation. I know other countries have applied competencies, in some it was a success, in others not so much, but unfortunately education policy in Mexico is always twenty years behind, in the OECD countries they already passed the phase we are in now (I-ST35).

The development of competencies was deemed necessary in order to enter the labour market.

This representation of the reform by the SNTE can be explained by their political position. As the SNTE did not have much support in Michoacan, the state union section chose to work closely with the national SNTE (I discuss this in more detail in Sub-section 6.3.1). The leadership of the Michoacan state section had a close

personal relationship with the leadership of the national SNTE, and the ways in which the state section spoke of the competency-based curricular reform, as well as the education situation of Mexico more generally, was similar to discourses expressed by the national SNTE.

6.2.2 Durango: competencies as 'the educational hope for Mexico'

In Durango, the competency-based curricular reform was adopted and re-interpreted in a political state context that was favourable of national education policies. For all respondents at the state scale, competencies had a positive connotation. During one of the training sessions in the north of the state, in a presentation by a senior official of the MoE, the curricular reform was presented as the 'educational hope of Mexico' (see Image 3) which would lead to better education and a better country.

Image 3: Slide from presentation of MoE. "The curriculum is the educational hope of Mexico. A better country". 7 January 2013



Source: Power point presentation participant I-ST10, presented during teacher training session

For my respondents at the Durango state scale, competencies were a combination of knowledge, skills and attitudes or values. The competency-based curricular reform was about the application of knowledge and values in reality, and my respondents stressed the importance of underlying socio-constructivist learning theories. The competency reform also signified a shift towards a learner-centred approach, which was promoted at the global and national scale together with competency approaches.

Similar to the national MoE and the CEAS in Michoacan, in Durango it was stressed that the curricular reform was about 'education for the development of competencies', which embodied a particular Mexican competency approach. One CEAS team member explained that,

[w]e are not calling it 'competency-based education', but 'education for the development of competencies', which is a bit behind the competency methodology. It means that our education provides the tools to develop competencies. In contrast, competency-based education is working with the competencies you already know doing (GI-ST2).

This explanation was slightly different from the interpretation of the CEAS in Michoacan, demonstrating the divergent ways in which competencies were interpreted.

In Durango too, an important element that shaped the interpretation of competencies was related to my respondents' ideas about the origins of competency-based education and inscribed voices (the context of influence to the reform). Although there was agreement that competency-based education originated in the world of work, and that the Mexican competency reform drew on international references from UNESCO, and the OECD, this was not perceived as a problem. This can be explained because the discourses that these actors and their recommendations embodied resonated with the dominant imaginaries at the state scale, which were centred around the ideas of knowledge and information society:

This is a trend that responded to a need, not just in Mexico but in the whole world, for a new way of educating individuals because we had to respond to a rapidly changing global reality (I-ST10).

The dominant social imaginaries at the Durango scale were about leaving one's context, often for the United States, and a view that favoured the urban over the indigenous. When I asked one senior MoE official what he thought about the critique of some states that the reform did not respond to local contexts he argued that,

[t]his possibly happens in states where there is a bigger indigenous population than Durango. Here in Durango we have less than fifteen thousand indigenous people, very few, but Michoacan, Oaxaca and Chiapas are states where they have a majority of indigenous population and maybe they refer to the needs of those populations rather than the global needs (I-ST10).

Another senior official argued with respect to this idea that,

[i]f we isolate ourselves from international policies, like Oaxaca and Michoacan do, we are left out of the possibility of development (I-ST11).

My participants at the state scale did not perceive the reform to have been imposed, as they argued that the context of influence to the reform was also made up of Mexican institutions, such as the UNAM, the Technological Institute (TEC) of Monterrey, the UPN, and civic and government organisations.

Furthermore, the context of practice in Durango was not perceived to pose a problem to the enactment of the reform. A story that circulated at the MoE during the time of research focused on a rural school, which despite its difficult context (lack of educational materials, situated in a low-income area), had come out very high on the standardised test ENLACE. This story was often quoted at the state scale, which illustrated the belief in the relevance of the reform for rural contexts, and the idea that competency-based education was not specific to a certain context. This idea was further sustained by the belief that there was room for the teacher to adapt the curriculum:⁸⁴

⁸⁴ *Planes y programas.*

The teacher adapts these contents to the context, if he applies them exactly the way they are prescribed it will not work, he decides what he takes from the content and how to translate it to his context (GI-ST2).

As such, this representation of competencies and the competency reform accommodated both perceived global and local interests at the state scale.

Within these overall discourses, there was disagreement on details, for example whether competencies are something that children have or can acquire. These differences in interpretation seem to be based on teachers' and MoE officials' previously held ideas, and their preferences for certain writers and books about competencies. For example, one CEAS team member did not like the work of one of the authors that the reform recommended, because he had attended a conference and found her too directive. Seeing as CEAS members train several hundreds of teachers, it is likely that such subtle individual differences in translation happened along the chain of interpretations and enactments.

6.3 The processes of the competency-based curricular reform at the state scales

So far, I have described the different competency discourses and the actors surrounding it. The way actors interpreted the competency reform had implications for the ways they enacted the reform. In this section, I describe the processes of piloting and implementing of the curricular reform in the period from 2008 to 2013 at the state scale.

6.3.1 Michoacan: Training teachers amidst organised resistance

In 2008, when the curricular reform was supposed to be piloted in Michoacan, the dissident teachers' union CNTE protested the national education policy ACE through strikes, marches, and the occupation of MoE offices (see Image 4), putting pressure on the MoE not to implement the reform, and preventing the application of standardised test ENLACE that accompanied it. During 2008, the

focus of attention of CNTE protests shifted from the ACE specifically to the curricular arm of the ACE: the competency-based curricular reform.

The decision of the MoE not to sign the ACE affected Michoacan financially, as the state lost access to important national education resources associated with the implementation of the curricular reform.⁸⁵

Image 4: Occupation of the Ministry of Education offices by the dissident teachers' union CNTE. Morelia, Michoacan. 28 February 2013



Source: Photograph taken by the author

Nevertheless, within this context, the CEAS, tasked with implementing the reform, started to work (see Image 5). The CEAS argued that an interest in education improvement motivated them to work in such an adverse climate,

⁸⁵ However, other sources suggest that Michoacan's administration did receive the resources, but that these were never transferred to the schools. Information retrieved September 2014 from: <http://www.cambiodemichoacan.com.mx/nota-191891>

although others at the state scale suggested that incentives offered by the national MoE such as trips and stays in luxurious hotels facilitated their participation.

The way in which the CEAS started to work with the reform illustrates the different ways in which the curricular reform was developed in different states. Surpassing the instructions of the CNTE leadership not to implement the reform, they assembled a team of acquainted MoE officials, mostly affiliated to the SNTE. According to a senior official within the team of CEAS, this group was motivated to participate because “[t]hey knew that the only authority to modify the curriculum was the federation, and they wanted to know the latest education developments” (I-ST13).

Image 5: Competency-based curricular reform teacher training session. Morelia, Michoacan. 9 April 2013



Source: Photograph taken by the author

The teachers' union SNTE also wanted to implement the reform, but as they only had marginal support within the state MoE, they bypassed the state scale

politics and looked for support directly at the national scale with the SNTE and MoE. With their support, the state SNTE assembled a group of academics who received training in the reform. The CEAS commented on the role of the SNTE in the reform that “the institutional ones always fought for a place in the reform” (I-ST49).

The prohibition of the CNTE to implement the reform, the lack of support from the senior MoE officials, and the lack of resources, complicated the ability of the CEAS to pilot the reform. In the reports about the advances of the reform in the state, the situation is described as follows:

For several years, Michoacan has encountered several problems that decrease the quality of education. An important factor is the political-union situation, which has complicated the implementation of the different proposed options by the federation to reduce the problems in education (Primaria & SEE, 2008, p. 7).

The CEAS explained that because the curricular reform was part of ACE, which was condemned by the CNTE, teachers rejected to work with the curriculum, as they feared this meant they would lose their permanent positions.⁸⁶ I substantiate these experiences of teachers in Chapter 7.

The CEAS reported to the national MoE that the topic of competencies was perceived problematic among the participants because there was not enough information about how to develop it in classrooms. Teachers grievances centred on this lack of information rather than a fundamental critique of competency-based approaches to education, and it was depoliticised as such. What is more, resistance to the approach was reported as misinformation:

Some teachers were not well informed and were prejudiced, but at the end of the training they concluded that the changes that the reform proposes positively affected student learning (Primaria & SEE, 2008, p. 4).

⁸⁶ *Plazas.*

During this first year, only a small number of MoE staff had participated in trainings, and no teachers were working with the reformed textbooks in their classrooms.

During the next school year in 2009-2010, the CNTE had signed agreements with teachers not to implement the curricular reform. They enacted their rejection by obstructing the reception of the new textbooks of the reform, and by obstructing CEAS trainings. One CEAS member recalled that,

[t]he *democraticos* stopped the training in several regions. All of a sudden a group of people would arrive at the place we were training asking the teachers we were training to retreat. They would steal materials and beamers (I-ST13).

However, for the dissident teachers' union, the acts were seen as legitimate acts of resistance, aimed to protect teachers from the curricular content developed by the national 'bad government'⁸⁷ which was 'colonised' by neo-liberal interests.

Within this context, the CEAS tried to train MoE personnel. One SNTE union activist explained that

[t]he reform develops slowly, sometimes in secret. When they [CNTE] would find out where were training they would come and boycott (I-ST9).

The SNTE enacted their support of the implementation of the reform, by asking parents to use the new textbooks instead of the old textbooks that belonged to the 1993 reform and which the CNTE had reprinted as an act of protest.⁸⁸

The leadership of the MoE changed during the second year, which affected the development of the curricular reform. The education minister was concerned with the stalemate in education between the MoE and the CNTE, and despite her initial critical stance towards the competency reform and the political project

⁸⁷ *Mal gobierno.*

⁸⁸ Information retrieved October 2013 from:
<http://archivo.eluniversal.com.mx/notas/622344.html>

it embodied, she argued that a sustained critique of the competency reform could only be given if teachers had tried to implement it. Due to its closer ideological position to the dissident teachers' union CNTE, the new leadership was able to forge an agreement with the CNTE not to obstruct the implementation of the reform in the schools that wanted to implement it.

The processes of piloting during 2008-2011 were also intended to provide space for teachers to comment on the reform. My respondents within the MoE, CEAS and SNTE perceived that there was space for making suggestions to the details of the reform, such as the expected learning outcomes and didactic strategies. However, the MoE argued that the most important work of the reform had been done at the national scale, even before the pilot was sent. The education minister commented that during this second period,

[t]hey organised a lot of events, in the best hotels and restaurants, to show off to teachers, but there were no extra resources for real academic discussions about the fundamentals of the reform such as the competency approach or the economic ideology (I-ST8).

The MoE wanted to use the space that they were given to develop a coherent feedback and critique and even an alternative to the federation, but as one senior MoE official explained: "We did not have a clear basis on which to act. We simply do not have the time nor the resources to develop education alternatives" (Mario). According to him, the work since 2008 had been "political, trying to come to agreements with the CNTE, and keep the MoE afloat" (I-ST31). By the time the education minister, who had adopted a critical but constructive stance towards the reform had left office, an administration politically and ideologically oriented towards the national scale had taken over, with a reduced interest in providing alternatives.

Throughout the processes around the reform, the CNTE leadership did not participate in the pilot sessions, because they argued that the consultations were simulated. For them, the meetings did not provide real space for participation, debate or discussion, because they argued that there was no room to argue against the fundamental aspects of the reform - such as a

competency-based approach to the curriculum, the graduate profile, the competencies for life, and other standards - nor the economic framework in which it was set.

However, for the teachers' union SNTE, Michoacan had enough space in the processes around the reform to transform the reform. For them there was space for teachers to comment on the reform during the pilot process. Moreover, for the SNTE the nature of the competency reform was flexible, which meant that teachers could adapt it to their contexts. The teachers' union SNTE therefore perceived the reform as participatory.

During the second year (2009-2010), more and more MoE staff started to request training, and by the end of the year around 3,084 people were trained.

In the school year 2010-2011, the national instruction was to pilot the reform again in years 3 and 4, and to implement it in years 1, 2, 5 and 6. This was the first year in which the CEAS reported that teachers were able to work with the reform in the schools: "We were finally able to reach the students" (I-ST13).

In August 2011, the re-written curriculum 2011 for basic education was published. By that time, it had become clear that the national scale was preparing reform to the hiring conditions of teachers, which shifted the protest of the dissident teachers' union CNTE towards this issue. This provided more space for the CEAS to implement reforms in schools. This space opened up, politically and financially, when the PRI was elected in 2012.

6.3.2 Durango: Emphasising teacher training

The processes of piloting and implementing the competency-based curricular reform in Durango developed differently than in Michoacan. From the beginning, the reform was received in a political context that was favourable towards education reforms emanating from the national MoE. The senior officials in charge of the reform had been involved in the competency reforms of

secondary and preschool education, and did not raise the issue of competencies as a problem. However, for junior MoE staff, who were new to competency-based education, the lack of information around competencies generated hesitation at first. For example, some people expressed they did not know how they were going to implement the reform in the districts that lacked electricity.

The CEAS team in charge of implementing the reform recalled that there was some initial resistance to the competency reform among junior MoE staff, which was understood as a resistance to change. Within the MoE, critiques of the reform were de-politised and attributed to a lack of knowledge:

Some teachers thought that we were implementing a competency reform which we copied from other countries. Ignorance led them to think that (I-ST44).

However, because at the Durango state scale there were no organised groups that expressed discourses of rejection of national reforms, teachers that were critical of competency education did not have discourses to link their critiques into. The teachers' union SNTE, did not play a role in the education/pedagogical debate, as the MoE emphasised the separation of the pedagogical and labour aspect of education in Durango:

There was some resistance not so much with regard to the pedagogical but the labour aspect. But we let the unions take care of that. But there has never been an organised boycott. No union has ever obstructed our work (GI-ST2).

At the Durango state scale, the perceived challenges during the processes around the interpretation and enactment of curricular reform related to teacher training. My respondents expressed that the cascade method of implementing reforms in Mexico, through which a small group of staff trained bigger groups, was problematic as it led to distortions of the information:

We continue to trust in cascade training which distorts or reduces information. With all due respect to my colleagues from the UNAM for accepting the commitment to train tens of thousands of teachers in the

teacher training courses⁸⁹, but no other country in the world would do something like that (I-ST11).

The reason score low on PISA is not because education reform proposals are wrong, or because there are not enough resources. I think it is rather about implementation, and mainly teacher training, which was never developed adequately (I-ST10).

One member of the CEAS recalled that,

[o]ne of the main challenges was that teachers would dominate the new curriculum, to make them really understand, that they really interpret it and that they really implement it as the curricular approach is intended (I-ST44).

The MoE's approach was to focus on developing teacher training strategies, such as conferences and workshops (see Image 6). The CEAS attended training and feedback sessions at the national scale. During these sessions, it was perceived that actors had a space to comment on the details of the curricular reform, such as the expected learning outcomes. Another CEAS member recalled that,

[w]e commented on the textbooks, and we told them: this word does not go there, or this date is incorrect. We would send them back to Mexico and when we saw our suggestions were incorporated we were really motivated (I-ST48).

⁸⁹ *Diplomados*.

Image 6: Competency-based curricular reform teacher training session. Durango, Durango. 24 May 2013



Source: Photograph taken by the author

Actors within the MoE felt that they had been able to influence and shape the way the national competency-based curricular reform developed in Durango, for example by adjusting the exercises that were aimed at developing certain expected learning outcomes to the Durango context. Therefore, actors argued that the reform has been 'participatory', which added to the positive association, or positive 'emotional economy' (Apple, 2008) of the reform at the Durango state scale.

This perception contributed to the idea that the reform was developed in a participatory way rather than being imposed. The MoE stated that they did not participate in the text-writing of elements the competencies for life, the graduate profile, the curricular standards, or the overall socio-economic imaginaries, but this was not perceived as problematic. Trust was placed in the ideas and motives of the national government, as the following quote from a

senior official illustrates: “Education policies have to emanate from the federation, this is how it is” (I-ST11).

6.4 Alternative education as resistance to the competency-based curricular reform?

So far, I have shown how representations of the curricular reform within the dissident teachers' union CNTE in Michoacan led to its rejection, which translated into a lack of support from the state MoE to the implementation by the CEAS, as well as a lack of financial support from the national MoE. In Durango, in contrast, the reform was represented positively at the state scale and its implementation was supported. In this last section, I discuss how resistance against the curricular reform in Michoacan also took an educational form, how this shaped the processes around the curricular reform at the state and school scales, and why it did not take form in Durango.

6.4.1 CNTE in Michoacan: The Democratic Education and Culture Programme

In addition to the discursive and political rejection of the competency-based curricular reform described above, the rejection of the curricular reform by the dissident teachers' union CNTE also took the form of educational alternatives at the scale of the Michoacan state. Within the CNTE, some argued that the best strategy to resist national education reforms was the development of an alternative education proposal. The general secretary of the CNTE during the second period recalled that,

[t]he struggle has been how to critique and reject the reform. Some *compañeros* say we have to confiscate the materials of the reform, such as the textbooks, so they do not arrive in the schools. That's fine, but I told them that the best resistance in the long term is not just to stop the reform but to develop our own alternative project (I-ST14).

During the reform processes, the CNTE had developed what can be described as a parallel system of education policy making. Due to the historic hegemonic

position of the CNTE in Michoacan, the union had been able to obtain financial support from the state MoE for their education project. The CNTE referred to their education project as 'alternative', 'own'⁹⁰ and 'relevant', in order to distinguish it from the 'foreign' and 'imposed' national education proposals. The CNTE held education congresses,⁹¹ which were intended to inform and document teachers' experiences, and develop an alternative education proposal and teacher training system⁹² (see Image 7). They also held political and education training sessions.⁹³

Image 7: Curso-Taller Regional Del Educador Popular. Morelia, Michoacan. 17 July 2012



Source: Photograph taken by Fernando Hernández Espino

⁹⁰ *Propio.*

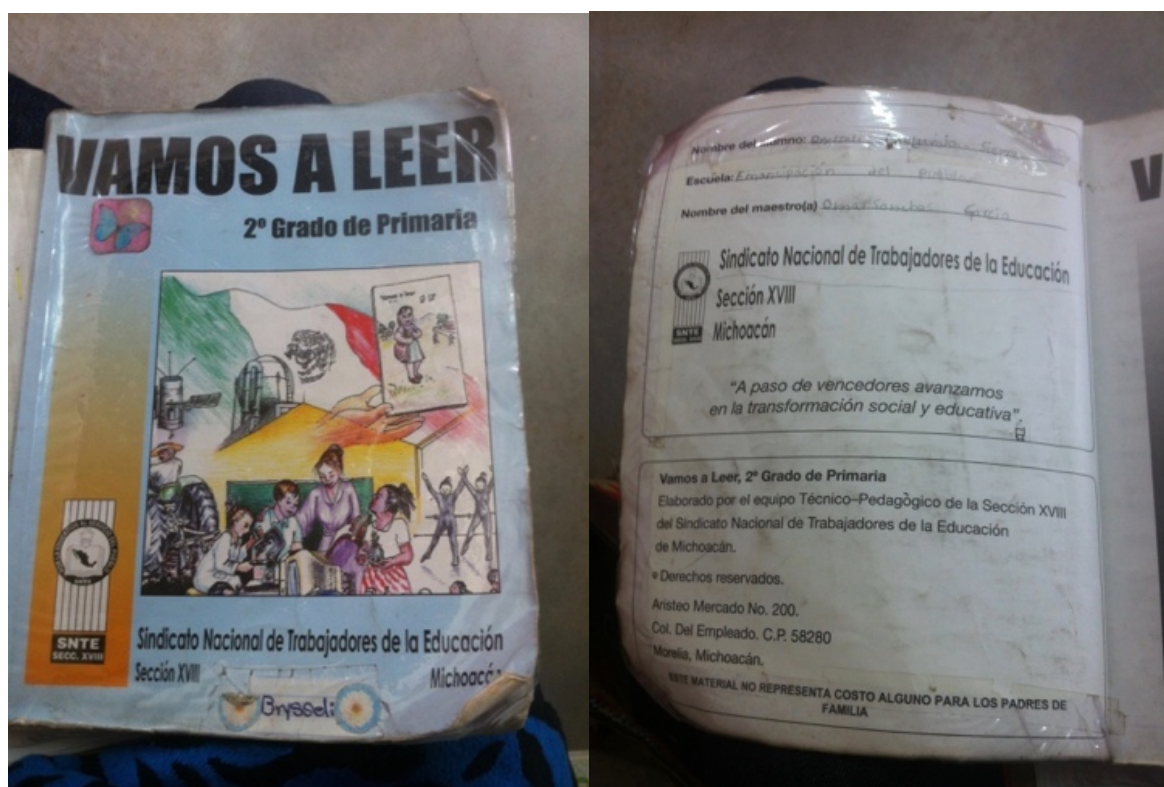
⁹¹ *Congreso Estatal Popular de Educación y Cultura.*

⁹² *Cursos-Talleres Regional del Educador Popular.*

⁹³ *Seminarios Pedagógico, Político y Sindical.*

The 'holistic' schools,⁹⁴ which had been proposed since 1995 as "a humanist, critical alternative to capitalist education, towards a socialist society" (I-ST39) were also part of the education project. The CNTE perceived of their schools as offering "public, free, secular, compulsory, scientific, popular, poli-technical, universal, nationalist, internationalist, humanist, democratic, critical, patriotic, inter and trans-disciplinary, solidary, cooperative, playful, transformative and creative education" (SEP/CNTE, 2010, p. 3). At the time of research, according to the CNTE leadership, there were around sixty-seven schools for preschool, primary and secondary levels, around 600 teachers, and around 5,000 students. They also developed alternative textbooks for years 1 and 2 (see Image 8).

Image 8: Textbooks that are part of the alternative education proposal of the dissident teachers' union CNTE



Source: Photographs taken by the author

⁹⁴ Escuelas integrales.

However, for the education minister who was open to receive education proposals that could form an alternative to the national reform, (during the second period), the cooperation with the CNTE was problematic. According to a senior MoE official, the CNTE proposal consisted mainly of critique, and included broad ideals and statements about “the education they wanted” (I-ST15), rather than curricular content, pedagogical proposals or evaluation mechanisms. One senior official argued that,

[w]e were open to working with them but we were constantly saying: we're giving you all this money, you need to give us something to show. You just want us to give you all this money without us being able to know how you are doing? (I-ST31)

The counterargument of the CNTE was that each school should be free to develop their own curriculum on the basis of the overall education project adapted to their school context. The MoE also argued that only a few 'holistic' schools were operating, and that the rest were involved in conflicts between the CNTE leadership, its rank and file, and parents. Within the CNTE leadership, some argued that the focus of the resistance to the reform had been on the discursive and the political, rather than the pedagogical form:

The work we have done is mostly analysis and critique of education policy, and arguing why it is necessary to construct alternative education. But there has not been a lot of construction of the pedagogical project, that's the problem (I-ST54).

Whereas during the second period the MoE was characterised by an openness to the CNTE's alternative education proposals, the third period was characterised by the repression of the CNTE and a focus on the implementation of the curricular reform. This meant that Michoacan's teachers were now increasingly working with the competency-based curricular reform in which the CNTE had not participated or commented on, nor was there an alternative education project for all the years of primary education. I further discuss what this meant for teachers' interpretations and enactments of the curricular reform in Chapter 7.

6.4.2 COCOPO schools in Durango

During the curricular reform processes, there were no discourses of rejection against the competency-based curricular reform at the scale of the state. This can be demonstrated through the case of the Popular Worker Coordination Council COCOPO in Durango, a small social movement of about two hundred teachers. Only this movement expressed discourses of rejection against the competency-based curricular reform. Their imaginaries resembled those of the dissident teachers' union CNTE in Michoacan. For COCOPO, the competency based-reform fitted in a neoliberal project, and did not take into account the conditions of poverty of many Mexicans. Their discourses about alternative education, which for them should arise out of the educational needs of the poor, emphasised the political education of children, focusing on the development of Mexican 'autochthonous' culture, and the education of children for real life. These priorities were translated in images that could be seen on the murals around the school (see Image 9). Although COCOPO ran a preschool, primary, secondary and upper secondary school, they had not developed an alternative education proposal, or an alternative set of teaching or learning materials.

Image 9: Murals around COCOPO school



Source: Photographs taken by the author

Within Durango's MoE, the strategy was to delegitimise the critique of the COCOPO. Their lack of an alternative education proposal weakened their ability to influence and shape the meaning of competencies and influence processes

around the reform at the state scale, and was used as a justification not to take their critique seriously. One senior MoE staff asserted that,

[t]hey reject the curricular reform because it is on the basis of competencies, but what do they offer instead? Nothing. Empty a-systematic attempts (I-ST11).

COCOPO's opposition to the education reform was also dismissed as a project about labour objectives rather than educational objectives, which was only interested in obtaining jobs for their family and friends. MoE staff emphasised their lack of knowledge about the competency-based education reform and how this linked into processes of development:

I do not know whether you asked them: 'what does neoliberalism mean to you?' You will not hear anything. They just repeat what is transferred from mouth to mouth, which is especially strong in the southern states (I-ST12).

As such, the MoE restricted the development of education projects that were alternative to what was perceived as the neoliberal competency-based education reform.

6.5 Conclusions

In this chapter, I have explored the politics of the re-contextualisation of competency-based education, by discussing how the curricular reform was re-interpreted by different education actors at the scale of the Mexican states of Michoacan and Durango, and how this can be explained by different elements of the contexts within these states. I have described the competency discourses and imaginaries that actors drew upon, and those that were excluded.

The different representations of competency education can be explained by the political situation at the state scale. In Michoacan, three periods can be distinguished in the education political configuration of actors and discourses at the state scale that shaped the meaning of competencies. The first period, at the beginning of the curricular reform processes, was characterised by the rejection

of national education policies by both the MoE and the dissident teachers' union CNTE, and the holding of permanent strikes by the CNTE. The communication and working relationship between the MoE and CNTE gradually improved during the second period, increasing the space to work with the national education reform for the MoE, CEAS (team in charge of implementing the curricular reform), teachers' union SNTE and some teachers. The third period, when the political affiliation of the state changed towards the PAN, and which by that time was also in charge at the Mexican national scale, was characterised by openness towards national education policy, and a breakdown in the relationship between the MoE and CNTE.

The competency-based curricular reform was interpreted within this political context in Michoacan. The dissident teachers' union CNTE, initially played the role of key interpreter by actively reshaping the meaning of competencies as 'the Trojan horse of neoliberalism'. Competencies were associated negatively with the idea of competition. For them, competencies meant 'narrow' vocational skills (rather than an integrated set of knowledge, skills and values), imposed by external financial interests. Importantly, competencies were thought not to be relevant, mainly because the material and socio-economic context of Michoacan (and Mexico in general) differed from the contexts in which the CNTE argued competency-based education had originated. Michoacan's socio-economic context was thus politicised as part of the problem and became reason for its rejection. The CNTE rejected the economic and social imaginaries that gave competency education meaning in the curricular reform, which clashed with their socialist imaginaries. Competencies also obtained meaning because it was part of the rejected policy ensemble (ACE). Competencies thus worked as a "floating signifier" (Buenfil Burgos, 2000; Buenfil-Burgos, 2000), that carried enough meaning - that of integration into the global knowledge economy -, and were moreover part of a complex "emotional economy" (Apple, 2008). For the CNTE, the competency-based curricular reform acquired meaning because of this representation of the central element (competencies, competency-based education), which led to the rejection of the reform by the CNTE in Michoacan.

In Durango in contrast, the reform was interpreted in a context at the state scale that was politically aligned with the national MoE, despite the fact that Durango was headed by the PRI, a political party different from the PAN that initially ruled the national scale. The political situation in Durango was characterised by a close collaboration between the MoE and the teachers' union SNTE on the matter of pedagogical and educational issues. The socio-economic imaginaries of integration into the global knowledge economy that shaped the competency-based reform resonated with the embedded imaginaries and agendas at the scale of Durango state. The MoE played the role of key interpreter of the competency-based reform as the 'hope for Mexico'. The idea of competencies was more aligned with the interpretations of competencies found at the national scale, such as competencies being an integrated set of knowledge, skills and attitudes, favouring a learner-centred and life skills approach, and it being relevant for the Durango context. Despite the fact that Durango, like Michoacan, has many rural teachers, socio-economic context was not politicised, and not seen as making the enactment of the reform impossible. As such, competencies became part of a positive emotional economy, which led to the policy decision to support its enactment.

These different social representations of the curricular reform at the state scale led to different enactments. The dissident teachers' union CNTE initially enjoyed overwhelming support in Michoacan, and was able to influence the MoE to resist participation in the pilot studies of the curricular reform, and the application of the reform in Michoacan. Initially, this meant that the implementation was not supported politically, financially or practically. Later on during the processes, when the CNTE lost influence in the political sphere, increasingly spaces opened up for MoE and CEAS officials, as well as teachers, to develop the curricular reform. This meant that in Michoacan, a state seen as resisting national education reforms as well as proposing education alternatives (Street, 2003), a reform was implemented in which the CNTE hadn't participated (in the (limited) space that was provided by the federation during the processes of piloting). Because the CNTE had focussed on the political and discursive

forms of resistance and struggle, their attention had not been on the development of alternative education, as a form of resistance.

On the other hand, in Durango, the political support translated in a participation of the MoE in the (limited) space that was provided by the federation during the processes of piloting of the reform. The MoE had been able to influence and shape the way the national reform developed in Durango, for example by adjusting the exercises that were aimed at developing certain expected learning outcomes to the Durango context.

In this chapter I have shown how the different trajectories of competency-based education at the sub-national scale were shaped by political and (the representation of) material contexts at the state scale. In the following chapter I explore how competency-based education was re-contextualised and transformed at the scale of schools.

Chapter 7 Re-contextualising competencies within schools

In this chapter I further discuss the contextualisation of the competency-based curricular reform, by analysing its interpretation and enactment by teachers at the scale of schools. I pay attention to how teachers' creative interpretations are shaped within discursive, political and material contexts in eight different locations within Michoacan and Durango. In other words, I discuss the nature of the 'live' practices (Ball et al., 2012, p. 1) of the competency-based curricular reform within school contexts, and how the reform was transformed as such.

In Chapter 2, I argued that although the education political contexts in Michoacan and Durango differed, the socio-economic imbalance within the states were similar and that this shaped teachers' work, including their ability to implement the curricular changes. In both states, many teachers worked in rural areas where they experienced a lack of the materials that are mentioned in the curricular texts as important for developing the curricular reform, which range from large sheets of paper to school libraries and computers (see Chapter 4). In many rural schools as well as peri-urban schools, there was a lack of access to the Internet or electricity. In some extreme cases, rural schools were faced with the lack of chairs or tables. Rural students often faced the lack of certain facilities at home, such as computers, or places to study. Without nearby medical facilities, teachers also had to fulfil the role of doctors, which took time away from teaching the curriculum. The access to training for teachers located further away from urban centres was limited, and Ministry of Education support staff visited rural schools less often than in urban areas. In this chapter, I discuss how these complex school contexts, shaped the enactment and contestation of the competency-based curricular reform in different ways.

I discuss how teachers interpreted competency-based education in the curricular reform differently in Section 7.1, and in Section 7.2, I discuss how the patterns of enactments of the reform differed from those at the scale of the state. In 7.3, I discuss how interpretations and enactments were shaped by the lack of information about competency-based education, and in Section 7.4 I

explain how differences in material contexts within the states shaped the enactments of the curricular reform. In Section 7.5, I show how evaluation mechanisms shaped the enactments of the reform at the school scales. Lastly, in Section 7.6, I draw some conclusions on the politics of the re-contextualisation of the competency based curricular reform at the school scale.

7.1 Re-reading the competency-based reform

In this section, I briefly discuss how competency-based education in the curricular reform was interpreted, or re-read, at the school scale and how this was different in Michoacan and Durango. I argue that, similarly to the national and scale of the state, competencies and the competency-based curricular reform were interpreted differently. These social perceptions could be distinguished on the basis of actors' representation of: one, the competencies concept (integrated set of knowledge, skills and attitudes/values versus skills, positive/negative connotation); two, the context of influence and text writing of the reform (dominant imaginaries/views/interests, participatory nature); and three, the context of practice (relevancy, need for alternative curricular reform, possible effects).

Teachers in both states expressed that their opinions and interpretations of competencies changed over the years. At first, in both Michoacan and Durango, there was little information about the reformed curriculum and competency-based education specifically. There was little information communicated to educators before and at the beginning of policy implementation. The information that was communicated was not specific as to how educators should develop the competency-based curricular reform in their specific schools. Within this gap, teachers often relied on the dominant interpretations of the reform and competencies at the state scale. In Michoacan, this role was initially played by the dissident teachers' union CNTE, which rejected it, representing competencies as 'negative', 'imposed', 'not participatory', and 'irrelevant for the Mexican context' (cf. I-ST54, I-ST14 and I-ST46). However, over time, the State

Coordination of Advice and Follow-up (CEAS)⁹⁵ had been able to train a group of teachers. At the time of research, in Michoacan, three groups of competency discourses could be found.

For the first group of teachers, competencies were represented to mean competition, which had a negative connotation. For these teachers, the competency based curricular reform implied the training in 'narrow' skills for work and values that were favourable to capitalism, such as individualism, obedience and non-critical attitude to society. These teachers perceived of the context of influence to the reform as not participatory. They felt they were never consulted about the need for curricular reform, or what kind of changes they would suggest to improve the quality of teaching. Instead the curricular reform was perceived to emerge from and was designed by national and international financial institutions "who do not have the interests of the Mexican working class at heart" (I-SC9). A teacher from a rural school in Michoacan explained that,

[i]n Mexico, education politics obeys certain international standards, and it is the United States who puts up these standards through the IMF and the WB, and this leads all the countries to standardise their education policies according to economic policies (I-SC5).

In short, the curricular reform represented the interests of big business and the possessing classes rather than the interests of the Mexican working class. This group of Michoacan teachers rejected the neo-liberal imaginaries that provided meaning to the curricular reform, which was explained by a teacher from a dissident teachers' union CNTE 'holistic' school as follows:

Fundamental to our resistance is the idea: what country do we have, what country do we want, what education do we have, and what education do we want? So it is not just about education, it is about deciding where we want to go as a country (I-SC10).

For these teachers, competency-based education was transposed from another context to the Mexican context, for which it was both inapplicable and

⁹⁵ State MoE personnel in charge of implementing the reform.

undesirable, (for example, due to the lack of materials or access to the Internet). These teachers also questioned the reform's cultural relevance, for example to rural contexts. The new curricular reform requested teachers to develop students' presentation skills, but teachers in rural communities expressed that their students were less accustomed to public speaking. Teachers in rural areas also argued that examples provided in the curricular reform were more often related to urban contexts and that standardised content and standardised tests would lead to the erosion of Mexican indigenous history and culture. Another teacher from a dissident teachers' union CNTE 'holistic' school⁹⁶ commented:

How can we implement a universalised content on the basis of globalised visions which affects the diversity in countries? How are we going to teach the same content to indigenous peoples in Chiapas such as the Tzeltales as to the Purépechas in Michoacan? That is not right (I-SC8).

These teachers were all affiliated to the dissident teachers' union CNTE and their discourse reflected the competency discourse (that is, the interpretations of competency-based education) of the CNTE leadership at the state scale.

A second group of teachers at the school scale in Michoacan, also affiliated to the CNTE, thought differently about competencies and the reform. These teachers also believed that the context of influence to the reform was influenced by financial organisations, and they also did not agree with the neo-liberal socio-economic imaginaries that were embodied in the reform, but what distinguished this second group was that they saw some room for participation in the context of practice. They perceived the unfavourable material context as a challenge, rather than interpreting it as impossible or irrelevant to apply the reform. A teacher from a rural bilingual school explained how the reform was challenging but not irrelevant:

The reform is thought for urban contexts, because they give trainings but because we are far away from the city. It is very difficult to appropriate the curriculum, we are trying to adopt it. But there was not the information we

⁹⁶ *Escuela integral.*

needed. But it is difficult in rural communities, and more because I have several years in one group. I cannot make the exercises too difficult. But competencies do apply here, we can achieve it. But it implies much more effort, much more time and knowledge of the curriculum. But it does give us results (I-SC2).

Although most Michoacan teachers felt they had not participated in the development of the reform, and it was therefore not relevant to their school context, some teachers felt there was space for their participation in the classroom. They sometimes perceived there was a need for alternative education proposals, but they did not believe the 'holistic' schools of the dissident teachers' union CNTE provided a valid alternative.

A third group of Michoacan teachers associated positively with competencies. For them, competencies meant "something more than knowledge" (I-SC11), and included knowledge, skills and attitudes. The reform was about "applying knowledge in practice" (I-SC1), and was not associated with competition. For most of these teachers, the approach also favoured the autonomy of the child, at least in theory. They also argued that the competency reform aimed to move away from the memorisation or 'banking' approach to education, and was learner-centred. One head-teacher in an urban school in the municipality Zitacuaro expressed her ideas about this:

This is more about the interests of the children. Some children might be good at one thing and bad at another. We have to prepare the kids for the life that they are living. The benefits are great! (I-SC18)

These teachers believed that the context of influence was dominated by international organisations, the teachers' union SNTE and the national MoE, but the dominant neo-liberal socio-economic imaginaries resonated with their ideas about the future of Mexico. Additionally, these teachers believed there was room to adapt the reform to their classroom contexts, and as such make it more participatory. A head-teacher of an urban primary school in the municipality of Morelia, explained how she found room to manoeuvre the re-creation of the meaning of the competency reform in her classroom:

The flexibility in the style of teaching. But I cannot change the learning goals. If they say: do twenty activities, maybe I can do five or ten, that's where the flexibility is. Or if they say: the child has to learn the healthy eating plate, maybe some teach it with drawings and others with a model (I-SC11).

Similar, the head-teacher in the urban school in the municipality Zitacuaro explained that she believed the cultural pertinence of the reform could be added by the teacher in the following manner:

The textbooks might be a little off. We should recover the values of our context. For example, we play with the *trompo*⁹⁷, we have the kite contest. The children have to ask their grandparents how they dressed, or where the words *chocolate*, *metate*⁹⁸, *molcajete*⁹⁹, *tomate* come from. It depends on the teacher, they should not say 'there's nothing in my book about this, I am going to leave it out!' No. I say if the book does not tell us about the Roman numbers, it does not matter; I am an educator and I know this. I am going to take initiative, I am going to bring something to the class. We should not say 'I am following the reform literally'. The reform gives the freedom to teachers to enrich the concepts, the competencies, the projects, you can mix it up (I-SC18).

These teachers were affiliated to either the teachers' union SNTE or the dissident teachers' union CNTE, and their discourse reflected the state and national SNTE and national MoE perspective on the competency-based curricular reform.

In Durango, the teachers' perspectives were also divided into three groups. For the first group of teachers, competencies were an integrated set of knowledge, skills, attitudes and values. For this group of teachers, the attitudinal aspect of competencies was about showing a positive attitude towards learning, as well as 'behaving appropriately'. During a group interview with teachers from urban schools in the municipality of El Oro one teacher explained that the reform "is about a change in attitude, you have to behave" (GI-SC3). Competencies also had a positive connotation and did not mean competition. A few teachers

⁹⁷ A top which is spun by winding a length of string around the body, and launching it so that lands spinning on its point.

⁹⁸ A flat stone tool, a ground stone tool used for processing grain and seeds.

⁹⁹ A stone tool, similar to mortar and pestle, used for grinding products.

expressed that initially the term competency did provoke the meaning of competition, but most of them argued this changed through the teacher training courses.

For this first group of teachers, the competency-based curricular reform was about 'putting knowledge into practice', or problem-solving, as well as a learning-centred approach, which moved away from traditionalist styles of teaching. Traces of the global idea of lifelong learning were evident in their discourses, as is illustrated by a quote from a rural teacher during a group interview:

The reform is about developing abilities, attitudes, knowledge, which are based in the four pillars of education, so that the students learns to do the things, that he searches for his knowledge, though verbal abilities, that he learns to live together, that's very important, and to learn how to be, as a person, that we search our own identity, personally as well as peers and nationally, that they feel proud to be Mexicans (GI-SC1).

These teachers also believed that the reform came from other countries and that international institutions had an important voice in the context of influence, but this was not perceived as a problem. In general, teachers expressed that they found the educational and economic social imaginaries instilled in the reform relevant. A teacher from an urban school in the municipality of El Oro in the north of Durango explained that,

[i]f you do not know how to turn on a computer you're not up-to-date. We have to prepare ourselves for the world that surrounds us (I-SC7).

The reform was perceived to be relevant for the Durango context. Even an older teacher who worked in a rural school in the mountains without basic infrastructure, expressed that he did not question the relevance of central aspects to the reform such as a competency-based approach to education, English and ICT skills:

That's very important, of course, because the world advances and the children stay behind. The whole thing about computers is difficult, but the society is demanding it from us (I-SC29).

These teachers tried to adapt the competency reform to their contexts in inventive ways. After one class, the teacher who worked in a rural school in the mountains quoted above commented on one of the exercises he did that day:

I like to work with practical exercises, so I bring concrete things, sweets, and we play shop, you need to know how much you are going to pay. When we look at kilos, I sometimes bring fruit from the city and I pretend I am a salesman. The shop keepers here are very sly, sometimes when you pay eight pesos they do not give you the change and because the children are shy, they do not ask for change, and all of that has to do with competencies, abilities, maths (I-SC29).

The second group of teachers in Durango differed from the above teachers. For these teachers, the dominant influence of financial interest was perceived as problematic, and they argued the Durango context complicated the implementation, as the following quotes illustrate:

I do not think they have taken us into account, they did not listen to us, I think those who wrote the reform are sitting behind a desk, they do not see the needs of this community. I wished the people who designed this reform could come and have a look at these communities, I do not think they realised most of us do not have computers (I-SC33 - teacher in a bilingual rural school).

I think competencies have a lot of good aspects, but I do not think those who designed the reform took into account the context of the teacher and the child, because I know that reality and some kids are hungry. I work with children that come from violent families, how can I change that child, or develop attitudes in that kid? The problem is that the policy makers simply cannot imagine what it is to live like those children. Or like the single parent who takes care of six children. How can I change the reality of those children? I feel impotence in the face of all of this. The children need different things for quality education (GI-SC3 - teacher in a rural school).

They never asked me if I wanted a reform. Mexico looks at other country were the education system works, and they appropriate it and adopt it in Mexico. As if you buy a dress and it is too big and you adjust it so it fit is you well. But it is not a Mexican reform, they implement it but they did not create it, it is a reform that comes from Chile, or Japan, I do not know where (GI-SC2 - teacher in a rural school).

However, none of these teachers would express these opinions openly, nor would they argue that there was a need for an alternative education proposal.

Similar to the Durango teachers in the first group, they argued that they found spaces in their classrooms to adapt the reform to their contexts:

People from outside the education field design these reforms. But there is a lot of flexibility, they give you the space to plan however you want, it is open, there is a margin for the teacher (I-SC15 - head-teacher in urban school).

Only a very small group of teachers, the third group, openly critiqued competencies and national reforms. They interpreted competencies negatively, and argued that competencies were the “Trojan horse of neoliberalism” (I-SC19 - teacher in an urban COCOPO school). The national and state MoE were perceived to be dominated by international neoliberal interests, and the competency-based curricular reform was not perceived to be relevant to the Durango context. Moreover, these teachers argued that there was a need for alternative education. This small group was affiliated with the COCOPO teachers' movement, which I introduced in Chapter 6.

7.2 Rejecting the reform?

Before I started researching the re-contextualisation of the competency-based curricular reform at the school scale, I had expected to encounter similar patterns of interpretations and enactments at the school scale as at the state scale. I expected teachers in Michoacan to contest and reject the reform, and teachers in Durango to support and work with the reform. However, as my fieldwork advanced, I found that interpretations and enactments in the schools did not neatly follow the patterns at the scale of the state and that this could be explained by schools' differently localised contexts.

In Michoacan, the CEAS (state MoE personnel in charge of implementing the reform) had been able to train an increasing group of teachers in the curricular reform. At the onset of my research, I had assumed that apart from this small group, the reform was not accepted or implemented at the school scale in Michoacan, and that this meant that teachers worked with the textbooks of the

1993 reform which were reprinted by the dissident teachers' union CNTE as an act of rejection of the curricular reform (as I discussed in Chapter 6)

However, the situation at the Michoacan school scale was more complex. A few weeks into my research,¹⁰⁰ my respondents started to point out that despite their discursive and political contestation and enactment in the form of protests and strikes, most Michoacan teachers did work with the revised textbooks that were part of the new competency-based curricular reform. This can be explained because on the one hand, some teachers disagreed with the curricular proposals of the national MoE and they were of the opinion that there was a need for an alternative, but they also argued that they needed to work with an education proposal and textbooks in their classrooms. They argued that as the dissident teachers' union CNTE only provided alternative textbooks for year 1 and 2, using only these was not an option. Despite the claim of the CNTE that they had many alternative or 'holistic' schools, many teachers also perceived that only a few of these schools were functional, arguing that most of them were involved in disputes between the CNTE, teachers, parents and education authorities.¹⁰¹

Many teachers also expressed that they were frustrated over corruption practices within the dissident teachers' union CNTE, for example the assignment of teacher positions to friends and family, the forcing of teachers to participate in strikes, or preventing them from working with the reform. The union assigned employment benefits such as permanent teaching positions, economic incentives, and promotions to the most active teachers, on the basis of the '*marchometro*', which is an informal record of the participation of CNTE teachers' in protests. For many Michoacan teachers, the existence of these practices within the dissident teachers' union CNTE, which were similar to practices within the teachers' union SNTE that was dominant at the national scale, affected the legitimacy and dominant position of the dissident teachers'

¹⁰⁰ When I felt rapport had been established.

¹⁰¹ I was not able to verify this claim for the 57 different 'holistic' schools myself.

union CNTE in Michoacan as well as the legitimacy of their alternative education proposal.

As the curricula reform processes advanced, Michoacan teachers increasingly started informing themselves about the reform and requesting training. These teachers expressed that they started to see the governments' curricular reform as offering better solutions to their critiques of education. They also started to take the position that change could better happen in the classroom, rather than during strikes and protests. This meant that, at the time of research, many teachers were working with the textbook that belonged to either Curriculum 2009 or Curriculum 2011 (which I discussed in detail in Chapter 4). A head-teacher from the urban school in the municipality Morelia commented that "[o]nly if someone comes to our school, you tell them you oppose the reform" (I-SC11). One senior official at the Michoacan state scale commented on the situation at the school scale:

It is a simulation: teachers have learned to use the teachers' union [CNTE]. They say, you tell me to march, I'm walking, but you tell me to do this in the classroom, if it suits me I will and if not, I will not (I-ST49).

Image 10: Teachers assist the State Education and Culture Congress organised by the dissident teachers' union CNTE. 18 April 2013



Source: Photograph taken by the author

Teachers navigated this complex context by separating critique of the curricular reform and participation in union actions, from working with the reformed textbooks in their classrooms. They made sense of the distinction by

distinguishing between the curricular texts (the *planes* and *programas*, which I called curricular texts in Chapter 4), and the textbooks that were part of the new curricular reform. The curricular texts were represented as more political texts, and were associated with the national and state MoE, the government, the teachers' union SNTE and the new curricular reform. The textbooks were seen as less political. A teacher from a rural bilingual school in Michoacan's municipality of Zitacuaro explained that,

[m]aybe other teachers do not have the curricular documents,¹⁰² but I tell them: if you use the books does not that mean you are working with the new reform? (I-SC1)

A senior activist with the dissident teachers' union CNTE at the state scale confirmed the idea that despite their affiliation to the CNTE, most Michoacan teachers worked with the revised textbooks of the new curricular reform:

Eighty or ninety per cent of the teachers are associated with the CNTE, and ninety per cent employs the discourse of resistance, but in practice I think almost all of them work with the official lines. Only ten per cent escapes this, at the most (I-ST54).

Those who 'escape this' were the Michoacan teachers that worked with the alternative books developed by the CNTE in the holistic schools, but even these teachers used the revised textbooks provided by the MoE in their teaching practice, as the CNTE only developed alternative textbooks for years 1 and 2.

Working with the competency-based education reform in a state that was politically opposed to national education policies was risky for teachers, as a teacher in an urban school in Zitacuaro explained:

We were very criticised in the school zone, they told us we were not allowed to implement it, the supervisor said: do it if you want to and good luck. But she never helped (I-SC19).

¹⁰² That is, the *planes* and *programas*.

A Michoacan teacher trainer at the scale of the state added to this that "[m]any teachers who attended training sessions related to the reform got into trouble, they [CNTE] wanted to fire them" (I-ST55).

However, these teachers worked with the textbooks in their classrooms, some of them affiliated to the dissident teachers' union CNTE, seemed to experience some freedom from the state (CNTE controlled) MoE and the CNTE union structure: they explained that their superiors did not really care what they did in their classrooms, as long as they would support the CNTE discursively and politically (see Image 10). An urban school head-teacher reflected on this situation in the following manner:

It is very stressful. It took a long time before our textbooks arrived, because they burnt them. Next Friday there will be a protest of the union, but we are not going. We sort of belong to the CNTE, because those who are at the head of our school zone belong to the CNTE (I-SC18).

In Durango, in the other hand, the institutional structure supported the processes of the curricular reform, and all teachers had copies of the reformed curricular texts (*planes* and *programas*) as well as the textbooks. Contrary to my initial expectations, this did not mean that all teachers agreed with the need for competency-based curricular reform. However, they would only express this critique in private conversations, or in the context of their classrooms, but not when their superiors were present (for example during teacher training sessions). In Durango, there was no union structure that articulated a critique of competency-based education, or would back up teachers politically. Rebelling against this culture was not perceived as a viable option for teachers, as illustrated by a head-teacher in an urban school in the municipality of Durango:

The other day I attended a conference by a Spanish guy, and he asked us why we do not tell the government we do not want the reform. The sad thing is that our union who theoretically has the power to mobilise all of us has not done anything. If I start to rebel on my own they will give me a call and tell me: be careful, you still have a job, and you have three children to maintain, so be careful. So what do you do? You try not to create conflicts, deal with your problems, do your job, and you go home (I-SC15).

Most teachers in Durango expressed that although it was difficult to implement the new curricular reform in the contexts of their schools, the change it foresaw was good. They argued that it came down to teachers' attitudes to implement it. An often heard phrase in Durango was '*echarle ganas*', which translates freely as 'trying your best'. The head-teacher in the urban school quoted above explained that,

[w]e do not really have a choice because they already approved the reform, we have to implement it. I cannot oppose it because it is my job. I was married, it was difficult but things are put in your way to solve them. If you like your job and you have a good attitude you can do everything (I-SC15).

Some teachers expressed that even if they did not agree with the socio-economic development ideas and imaginaries that the reform expressed, they would not be able to resist these global movements. The head-teacher stated that "[m]aybe it is not the country we want, but you cannot fight Samson" (I-SC15).

In Durango, only teachers affiliated to the teachers' movement COCOPO openly contested the need for and applicability of the competency-based curricular reform. However, these teachers too worked with the textbooks of the curricular reform, as they had not developed an alternative education proposal or alternative textbooks.

7.3 Enacting competencies within a context of lack of information

The interpretations and enactments of the curricular reform were also shaped by the lack of information about competency-based approaches to education. In Michoacan, those teachers who wanted to be trained in the curricular reform, were not supported by either the dissident teachers' union CNTE (to which most were affiliated), or by the MoE. The directors of the MoE's education departments of primary education were affiliated to the CNTE, and so was largely their bureaucracy. Teachers were initially prohibited from applying the reform, although later on the use of the reformed textbooks was silently

condoned. Much of the MoE staff that was in charge of supporting the curricular reform had not been trained in the new reform. This meant that they did not have in-depth knowledge of the way in which the curriculum reform operationalised competency-based education, or competency-based approaches to education in general, which impacted the ways they were able to assist teachers with the interpretation and enactment of the reform. The following quotes illustrate this:

Most supervisors do not have a clue about competencies. And if the supervisor who is our example does not have a clue, it will never be implemented as it should (I-ST52 - SNTE union official and teacher in rural school)

Those who come and tell us about the reform only have superficial notions of it (I-SC11 - urban primary school head teacher).

Michoacan teachers also explained they did not receive the new textbooks and curricular documents on time, due to obstruction of the distribution by the dissident teachers' union CNTE, which affected the way they are able to work with the reform.

In Durango, on the other hand, the MoE and SNTE at the state scale supported the reform, which was enacted by emphasising teacher training. A teacher in a rural bilingual school in the south recalled how in Durango, in the beginning, some people opposed the reform, but with the help of the supervisor, this resistance reduced. However, some teachers expressed that despite the political and discursive support of the curricular reform by their supervisors, there was a lack of concrete information and examples to develop the complex competency methodology in the reform. In interviews, after initial positive representations of the curricular reform, more and more teachers started to explain to me that they were at a loss how to change their teaching practices in ways that the reform demanded.

In addition, although the MoE and SNTE at the state scale in Durango expressed their support for the reform, my research at the school scales revealed that not all teachers felt supported by their supervisors. During a group interview with

likeminded teachers from the same school, a rural teacher shared his frustration in the following manner:

We want our bosses to actualise themselves too. The problem is that there is a lot of corruption in education, the supervisor are elderly people who sometimes even fall asleep in the courses. But they do not retire because it does not suit them because they are in *carrera magisterial*.¹⁰³ So they earn very well, we are talking about twenty-five or thirty thousand pesos a fortnight. If they would retire, they would just earn sixteen thousand pesos a month, so it is logical. We need new people, people who inspire us. Maybe I say these things because I am a bit of a renegade, but I really wish things were different (GI-SC1).

Those teachers who had received training (in both Michoacan and Durango) explained that the information was often not practical enough. In addition, sessions were perceived to be too short to really understand how to develop competencies rather than knowledge outcomes. Teachers struggled to define what competencies were about, how to apply the curricular reform in practice, or even which ideological stance to take vis-à-vis the reform (support or reject). Teachers who wanted to implement the reform were caught within a vacuum in which they had to implement the reformed curriculum often without sufficient training, assistance or information. This problematic position of teachers was also evidenced because during my contact with them, they would often ask me about my knowledge and opinion about competencies, and what I believed the consequences of applying it would be. Many teachers tried to deal with the lack of information by self-study, reading books about the topic (for example, a reference that teachers who were critical of the reform mentioned was (Sacristán et al., 2008), in an attempt to come to answers as to how to implement it, or what the alternative could be if they wanted to improve their teaching practice but not on the basis of competencies. Another effect was that teachers sometimes acquired additional, commercially published textbooks, which were more specific in information on developing competencies in practice, which shifted the cost of education resources onto teachers.

¹⁰³ Teacher promotion system.

One recurrent theme that teachers were unclear of how to deal with was that of authority. Teachers argued that before, they were in a clear position of authority. However, the new curricular reform asked teachers to develop autonomy in children, and, traditional techniques of authority, such as corporal punishment, were no longer allowed. This created situations where teachers would not know how to maintain control over the group and in many cases, they tried to deal with this by constantly raising their voices to shouting level. It could be argued this practice does not follow with the idea of teachers as facilitators of student learning, as the curricular reform stipulated.

Teachers in both Michoacan and Durango were often left to their own devices to interpret and enact the reform. In Chapter 4 I argued that the curricular texts embodied mixed messages regarding competency-based education, by on the one hand requiring teachers to develop broad competencies (integrated sets of knowledge, skills and values) while at the same time specifying detailed knowledge outcomes (expected learning outcomes). Teachers reported that they often focussed their classroom planning around the expected learning outcomes, as they found the idea of having to develop integrated sets of knowledge, values and skills vague. The specified learning outcomes provided them with indications of observable behavioural and knowledge outcomes. It could therefore be argued that this operationalisation of competency-based education will lead to development of 'measurable' or observable knowledge and/or behaviour outcomes, rather than broad competencies.

My research also revealed how teachers between and within both states enacted the development of similar knowledge outcomes differently. One way in which the diversity of interpretations was evidenced was by the different ways in which teachers used different teaching techniques to develop the same knowledge goals (as stated in the curricular texts), for example, relating to Mexican Independence. A teacher in a rural indigenous school explained that,

When we look at the Independence, I do not dictate stories, or give them questionnaire, because I feel like that it does not stick, they confuse the Revolution with Independence. As you can see in my planning I now work

with 'staging'.¹⁰⁴ so I say: 'I was Morelos and I did this and that' and then the children remember: Morelos is the one with the head band, Hidalgo is the bald one. This is what putting knowledge in practice means (I-SC1).

This teacher thus tried to develop students' knowledge of the Mexican Independence by 'acting out' the information and exercises from the textbooks in a narrative way. In contrast, another teacher from an urban school, enacted the goal to develop knowledge of the Independence by having her students make classroom presentations. In the processes of the re-contextualisation of the competency-based curricular reform, teachers' personal teaching styles and preferences, but also their knowledge of pedagogy and didactics, training, and dedication, affected the ways in which they interpreted and enacted the reform at the school scale. How teachers' practices will ultimately lead to the different development of students' competencies will become clear over the years, and needs to be the topic of further education research. Nevertheless, these examples suggest that the reform re-contextualised into diverse trajectories at the school scale.

7.4 Different material contexts shape enactments differently within states

In addition to the education political contexts that shaped the interpretations and enactments in schools differently *between* the states, interpretations and enactments were also shaped differently *within* the states. The curricular reform texts stipulated that in the 21st century the educational materials necessary for the development of the expected competencies have diversified. For example, the reform asked for school and classroom libraries be used to contribute to the achievement of the reading skills standards, and audio-visual and multimedia materials and the Internet were to be used to develop digital skills (SEP, 2008a, p. 33).

¹⁰⁴ *Escenificación.*

However, the enactment of these directives was complicated in different ways by the contexts of some schools, mainly between rural and urban schools. For example, many rural teachers, and even some of the peri-urban teachers did not have Internet access, and some did not have electricity (see Image 11).

Image 11: Lack of electricity in a classroom. Pueblo Nuevo, Durango. 28 May 2013



Source: Photograph taken by the author

For those schools without access to the Internet, the development of competencies that required the Internet was complicated, as the following quotes illustrate:

It would be great if my students could investigate online, but you cannot do that here. (I-SC9 - rural school teacher)

The textbooks refer to a web page, but we barely have television, let alone Internet (I-SC1).

Many rural teachers did not have access to projectors. The competency-based curriculum required teachers to develop students' presentation skills. The enactment of this competency was therefore facilitated differently in contexts where teachers had access to projectors, compared to contexts where they did not have access. For example, one teacher in a rural bilingual school enacted the development of presentation skills by having his students recite from their textbooks (see Image 12), whereas another teacher in an urban school stimulated the use of the online program Prezi, computers and projectors.

In rural areas, many teachers also expressed a lack of other teaching material, such as large sheets of paper. A teacher in a rural bilingual school expressed that,

[i]t is hard to adequate the content, because it is more for urban contexts. For example, the reform asks us for big sheets of paper, but here in the community it is hard to find those kind of materials (I-SC2).

Within these contexts, teachers found creative solutions in order to enact the competency-based reform, for example, by bringing their own computers or cell phones to school. The way in which teachers were able to develop competencies was different depending on whether materials were provided or not, which was similar within Michoacan and Durango. This suggests a different contextualisation of the trajectories of the curricular reform in rural and urban areas *within* states, in addition to the differences *between* states.

A recurrent problem for teachers was the development of their students' English language competencies, which was stipulated to be a priority in the curricular reform texts. The following quote by a rural teacher in the north of Durango illustrates part of the problem:

We are doing an English project, we've got the material, the yellow books, the ones you see over there, but they come with a cd and well...there's no electricity, so how do we work with them? (GI-SC3)

The enactment of the reform was also shaped by teachers' prior training experiences, as well as their dedication to teaching. For example, some teachers

expressed their first career choice had not been teaching, which affected their motivation to research ways to implement the reform in their school contexts.

Image 12: Students recite from their textbooks in a bilingual primary school. Pueblo Nuevo, Durango. 31 May 2013



Source: Photographs taken by the author

7.5 Steering competencies at a distance: narrowing down the curriculum

The interpretations and enactments of the curricular reform in schools were also shaped by other policies in the education policy ensemble (ACE¹⁰⁵), such as the yearly standardised student evaluation ENLACE.¹⁰⁶

The newly reformed curriculum projected a lot of information on teachers in both Michoacan and Durango, and moreover, as I discussed in Chapter 4, the curricular texts contained contradictions, between the demand to develop broad competencies and specific expected learning outcomes. Many teachers also argued that ENLACE with its multiple choice format evaluated knowledge rather than competencies. A teacher from a rural 'holistic' school in Michoacan argued that ENLACE focused on minimum standards, and led teachers to focus

¹⁰⁵ The Alliance for Quality Education, which I introduced in Sub-section 1.4.3.

¹⁰⁶ Mexican National Exam of Academic Achievement in Schools, which is a standardised, multiple choice exam which is applied yearly to years 3-6 of all primary schools since 2006. The test evaluates Spanish, maths and one additional rotating subject.

on memorization of content. In addition, although the competency reform texts emphasised the importance of the development of intercultural and gender competencies, these transversal skills were not measured by ENLACE, which shifted the attention away from their development. All the teachers in schools where ENLACE was applied argued that much of their time was spent in preparing their students for this exam. Teachers also trained students in taking the exam by applying the mock exam 'pre-ENLACE', which further reduced the time for other elements of the curriculum that were not tested.

During the competency-based curricular reform processes, it became apparent that there was going to be a reform of teacher hiring and firing conditions, which implied a coupling of students' scores on ENLACE to teachers' pay. The preoccupation with this reform was evident when during my initial contact with teachers they would think I wanted to talk about the reform to labour conditions rather than the curricular reform. Within this insecurity, teachers often relied on interpretations of key interpreters, such as the dissident teachers' union CNTE in Michoacan, and the MoE and teachers' union SNTE in Durango.

In Michoacan the dissident teachers' union CNTE urged teachers not to work with the reform, nor with ENLACE, telling them this would mean possibly losing their permanent teaching positions,¹⁰⁷. This meant that many teachers in Michoacan were afraid that by working with the competency reform, they would possibly be fired if the results of their students on ENLACE would be low. In Durango, on the other hand, some union members scared teachers into working with the reform, and used the test as an incentive:

We will see competitiveness in teaching and those who do things the best will continue working. Sometimes they scare us. They say 'if you do not do your best, there are many others who want to work'. They can take away your job (GI-SC3).

¹⁰⁷ *Plazas*.

Teachers were caught within this insecurity. A head-teacher in the municipality Michoacan described the feeling of insecurity this generated as follows:

We receive orientations from the CNTE, with their own opinions and critique, and we also go on the Internet ourselves. But many things I do not understand. Now that they say that in 2013 it will be implemented completely but we wonder what will happen to us if our class does not achieve the right level (I-SC1).

As the reform processes advanced in Michoacan, the MoE and SNTE had increasingly been able to communicate the idea that applying the reform combined with ENLACE would lead to financial benefits. Schools had therefore increasingly started to accept the test. A senior activist from the dissident teachers' union CNTE confirmed this idea. She argued that the growing numbers of teachers that accepted ENLACE was a sign that they had increasingly started to implement the curricular reform:

The control of the reform is ENLACE. In the evaluation you will find out how far the competency reform processes are developed, between those who want to be evaluated and those who do not (I-ST54).

7.6 Conclusions

In this chapter, I have discussed the nature of the complexities in which teachers interpreted and enacted competency-based education within the Mexican curricular reform of primary education at the school scale. I have described the relevant elements from teachers' school contexts that shape these processes, and how they were different in Michoacan and Durango. Although at the time of research the reform processes had been underway for a relatively short period, I also considered some of the consequences of education policies that draw on global policy ideas without enough consideration of localised contexts. In this conclusion, I discuss these main findings.

Similar to the national and state scales, different groups of competency discourses could be found at the school scales in the different states. In Michoacan, the first group of teachers adopted a similar competency discourse

as the dissident teachers' union CNTE at the scale of states. For them, competencies were perceived negatively. They meant a 'narrow' set of skills, and they were associated with competition. This group felt that they had not participated in the context of influence to the curricular reform (many argued they were never consulted about the need or form of reform), and argued that the reform was not relevant to their contexts. The second group of teachers similarly believed the reform did not arise from the needs of Mexicans but they experienced some room for manoeuvre in making the reform more relevant during the context of practice. The third group teachers interpreted competencies as being something more than knowledge. For them, competencies were about putting knowledge into practice, and it moved away from traditionalist 'banking' approaches to education. Also, competency was not about competitiveness, and the socio-economic imaginaries that the reform embodied resonated with their imaginaries. This discourse was more aligned with discourses at the state SNTE and federation MoE.

By contrast, in Durango, most teachers interpreted competencies in ways similar to the national and state MoE. That is, competencies were an integrated set of knowledge, skills and attitudes, and it was about putting knowledge into practice. Moreover, aimed to move away from traditionalist banking education, centred on the learner, and it was not necessarily associated with competitiveness. Most teachers argued that although they had not participated in the context of influence, they perceived space for participation in the contextualisation of the reform to their classrooms. However, contrary to the state scale, a large group of teachers felt that the dominant actors and influences in the competency reform had been international and national organisations, that their voices had not been included, and that the reform was not relevant for the Durango context.

Secondly, I have argued that whereas in Michoacan the curricular reform was claimed to be rejected by the dissident teachers' union CNTE at the scale of the state, enactments of the competency-based reform in schools differed from patterns at the state scale. This can be explained by the contexts in which

teachers work. In Michoacan, teachers worked within an institutional structure that was not supportive of the reform, but at the same time they expressed they had to teach something in their classrooms. This meant that despite their political and discursive rejection most teachers were working with the textbooks of the new reform as they were the only ones available. Teachers navigated this complex context by distinguishing between the curricular texts (*planes y programas*), which for them represented the national reform and which they rejected, and the textbooks, which they constructed as more practical or neutral tools. In Durango, different from the overall positive representation by the MoE and teachers' union SNTE of the reform at the state scale, some teachers were critical of the reform. But because there was no organised opposition to articulate discourses of rejection that could back them up, or provide (the promise) of alternative education projects, the reform would not be critiqued openly at the school scale in Durango. Only those teachers backed up by the small teacher organisation COCOPO openly rejected the reform, but they had not developed an alternative, and they too worked with the textbooks of the reform.

In addition, teachers' interpretations and enactments of the reform were shaped by the lack of provision of information about competency-approach. In Michoacan, those teachers who wanted to implement the reform not only worked within a context that was not supportive of the reform, but also experienced a lack of information about competency-based education and how to enact this in practice. In Durango, despite the political and discursive support at the state scale, teachers sometimes experienced that this remained at the level of talk, and that they did not actually receive much support. This was shaped by the lack of information about competency-based education and how to enact it in practice, but also by superiors which were not all trained and visited schools less than required. Teachers were caught within this lack of information, and they often had to find ways to enact the reform on their own, which further explains the different ways in which the competencies that were expected by the reform were developed.

The ways in which teachers were able to develop competencies was also shaped differently between contexts in which teachers had access to material elements, such as education materials, education infrastructure (electricity, Internet) or teacher training, a difference mainly seen between rural and urban areas. This division was similar within Michoacan and Durango, which suggests that in addition to the different contextualisation of the reform *between* states, the reform also contextualised differently in rural and urban locations *within* states.

Lastly, the focus on evaluation of competencies through standardised tests, and the coupling of the tests to teachers' pay, led to a focus on memorization and lack of attention to content that was not measured. This implied a reduction of the enactment of competency-based education at the school scale, for example, it shifted teachers' time away from teaching less measurable elements or transitional competencies such as gender. In Michoacan, this was part of the discourse of rejection of the reform, and initially teachers rejected the application of ENLACE. However, in the reform that was announced during the time of research students' outcomes on this test were going to be tied to teachers' pay during the implementation of the reform. Therefore, teachers increasingly accepted the reform.

Chapter 8 Conclusions: the contextualisation of global competencies in the curricular reform to Mexican primary education

I set out to study the politics of the re-contextualisation of education policies that draw on global education policy ideas such as competency-based education. The study was carried out by examining the “complex contestation, resistances and refractions at play between the policy text production and practice” (Rizvi & Lingard, 2010, p. 84) of the 2009-2011 Mexican curricular reform to primary education. This central line of questioning was motivated by my interest in understanding why countries adopt competency-based education to increase education quality, whose interests are served, and how these approaches are re-contextualised in diverse local, political, and material conditions to produce different outcomes.

I combined the conceptual ideas of policy as text and discourse, floating signifiers, imaginaries and enactment, with ethnographic methodological tools in a policy trajectory study. This allowed a conceptualisation of the Mexican competency-based curricular reform as understood and enacted through multiple and contested competency approaches. I traced the processes of representation and enactment of the curricular reform all the way through from its operationalization in the curricular texts, to its adoption, transformation and contestation at the Mexican national, state and school scales.

The main empirical contributions that have emerged from the analysis show that, first, global education policy ideas such as competency-based education can be thought of as a floating signifier. Second, the adoption, transformation, and contestation of competency-based education in Mexico can be explained by its different representations by key interpreters, at different scales of government, and within different contexts. These key interpreters interpreted and represented the competency-based reform differently, drawing on different discourses and socio-economic imaginaries. These representations had different effects on the re-contextualisation of the reform at these scales and

contexts. For example, at the Mexican national scale, the idea of competency-based education was promoted by the MoE, the teachers' union SNTE, the Institute of Research about the University and Education (IISUE) of the National Autonomous University of Mexico (UNAM), the OECD and UNESCO Mexico, because it was able to accommodate their various agendas and held the promise of integration into the global knowledge economy. In contrast, this was not the case at the Michoacan state scale of the policy trajectory, where it was rejected by the dissident teachers' union CNTE on the basis that it fitted with a capitalist agenda and was not relevant for the Mexican context. Third, I showed that during the processes of re-contextualisation along the policy trajectory, there was space for creative interpretation (room for manoeuvre) of the competency-based reform by different education actors, such as the Institute of Research about the University and Education (IISUE), teachers, or the team in charge of implementing the reform in the states (CEAS). However, this space was constrained differently between the different scales of the trajectory (national, state, and school), political contexts (neoliberal versus socialist), and material contexts (for example, the availability of education resources). This shaped the interpretation and enactment of competencies differently both *between* and *within* contexts, which further explained the contextualisation of competency-education in heterogeneous trajectories. For example, whereas in rural schools in both Michoacan and Durango the development of digital competencies was constrained by the lack of Internet, and other materials such as computers, in urban schools the development of digital competencies was facilitated by the availability of Internet. Fourth, the contestation of the competency-based curricular reform acquired three different forms. First, the meaning of competencies and the reform was contested, which I call discursive contestation. In addition, the reform was contested politically, for example, by striking or marching. And last, the competency-reform was contested at the educational level, in the form of the CNTE's alternative education proposal.

I added to the field of global education policies (GEP) in Mexico, by studying the complex relationships between global policy ideas, their dissemination and re-contextualisation. In addition, I added to critical education policy studies by

researching how the social and ideological conditions for the development of a national policy, and confrontation with the realities of actual schools, relate, mediate, transform, and contest the competency-based curricular reform. I expanded the methodological tools of a policy trajectory study, and applied it in a Latin American context. Overall, the findings have implications for understanding the politics of the re-contextualisation of education policies as ideological work; that is, the active struggle to define the meaning of floating signifiers by key interpreters. Moreover, the analysis allows a better understanding of the role of political and material contexts in producing unique meanings, practices, and outcomes at the Mexican (sub)national scales.

In Section 8.1, I elaborate on the empirical contributions in relation to the research questions formulated in the Introduction, followed by a theoretical discussion of the contribution and limitations of a policy trajectory framework for studying the politics of the re-contextualisation of curricular reforms in Section 8.2. Finally, in Section 8.3, I present some suggestions for further research.

8.1 Main empirical findings

In this section I discuss how, and in what particular ways, the competency-based curricular reform was re-contextualised in Mexico. In the first sub-section (8.1.1), I describe the different meanings that competencies took on for different groups of people, and argue competencies can be thought of as a floating signifier, which was able to accommodate different agendas, and which became part of an emotional economy, that allowed certain policy responses. Then, in Sub-section 8.1.2, I discuss the ways in which key interpreters at the Mexican national, state, and school scales actively tried to define the meaning of competencies in the curricular reform. Subsequently, in Sub-section 8.1.3, I discuss how the re-contextualisation of the reform was shaped by actors' political, and material contexts, and how the interpretation and enactment in interaction between the different scales of the policy trajectory. Lastly, in Sub-

section 8.1.4, I discuss the different forms of contestation to the competency-based curricular reform.

8.1.1 Competency-based education functioned as a floating signifier

This thesis focused on a specific element of the competency-based curricular reform, namely competency-based education, because it was a “red thread” running through the processes of the 2009-2011 reform. The analysis showed that global education policy ideas such as competency-based education can be thought of as a floating signifier. Competency-based education in the curricular reform obtained its meaning through its position within different discourses, understood as social processes of construction of meaning (signified) and connotations. Competencies meant different things to different people. Moreover, they carried either positive or negative significance; they were part of a complex “emotional economy” (Apple, 2008), which led to different responses (or enactments) to the curricular reform.

This conceptualization allowed me to research the re-contextualisation of the competency-based curricular reform, which took and was expressed in terms of different approaches or interpretations, as well as conceptualisations of the concept of competencies. I distinguished different interpretations of competencies and the competency-based curricular reform on the basis of actors’ representations of: One, Competencies and competency-based education. For example, did participants believe competencies were an integrated set of knowledge, skills and attitudes, or only skills? Did participants associate positively or negatively with competency-based education?; Two, the context of influence and text writing of the reform. For example, what did participants believe were dominant imaginaries, views or interests in the context of influence and text writing of the reform?; and three, the context of practice. For example, did actors believe the reform was relevant for their context and Mexico in general? What did participants believe had been dominant imaginaries, views or interests in the context of influence and text writing of the

reform? Did actors believe there was a need for an alternative curricular reform? What did actors believe the possible effects of competency-reform were for education, and Mexican development.

On the basis of the above representations, competency discourses that were similar across and between scales could be distinguished. Firstly, for the national Mexican Ministry of Education (MoE), as well as for the Durango state MoE, a large group of teachers in Durango, and a smaller group in Michoacán, competencies meant an integrated set of knowledge, skills and attitudes. Competencies were not associated with the idea of competition. Less measurable aspects such as life skills, and the development of broad competencies such as gender and diversity were emphasised. Competency-based education was perceived to be learner-centred. For these actors, competency-based education also held the promise of (further) integration into the imagined global knowledge society and economy. In short, for this group competencies represented the 'educational hope for Mexico'.

The exploration of the processes of meaning-making of the floating signifier competency prior to the competency-based reform to primary education helped in answering the question of why, and how, competency policy was adopted in Mexico as an approach to increasing the quality of education. In Chapter 3, I argued that at the Mexican national scale, since the 1980s, competency-based approaches to education reform acquired the promise of integration into the global knowledge economy, and it fitted within a human capital agenda. Subsequently, the policy idea was gradually adopted at all levels of education because its meaning was actively changed by key interpreters from work skills to life skills. (I flesh out the role of key interpreters in the next Sub-section 8.1.2.) The adoption of competencies can thus be explained by the promise of both economic growth and human development it acquired, and this meaning was path-dependent; that is, shaped since the 1980s, and durable.

For another group of actors, competencies meant 'narrow' skills, and was associated negatively with competition. It was seen as imposed by financial interests, and as irrelevant for Mexico. The economic and social imaginaries that gave competency approaches meaning in the curricular reform clashed with their socialist imaginaries. Competency-based education was perceived as the 'Trojan horse of neoliberalism'. Competencies also obtained meaning because the policy idea was part of the national governments' education policy ensemble Agreement for Quality Education (ACE), which was rejected by the dissident teachers' union CNTE. As such, competencies became part of a negative emotional economy (Apple, 2008), which led to rejection of the reform. These competency discourses were found within the dissident teachers' union CNTE at the national scale, the CNTE in Michoacan, a large group of teachers in Michoacan, and a very small number of teachers in Durango.

Within those overall interpretations, there were some differences. For example, while in the national MoE an approach to competencies was promoted that was informed by human capital, subjecting education to the macro-economy, UNESCO Mexico emphasised a more humanistic version (living together, culture of peace) of difficult measurable aspects such as values (gender, interculturality) and attitudes, and understanding education as intrinsically valuable. In another example, at the school scale, I showed that although a group of teachers in Michoacan argued that the reform did not arise from the needs of the Mexicans, they experienced some room for manoeuvre in making the reform more relevant during the context of practice.

Competency-based education was adopted by some groups in the reform because its nature as a floating signifier to obtain various meanings meant it was able to accommodate different agendas. In Chapter 4, I made the argument that it was adopted at the national scale within the MoE in a way that fitted with their imaginaries and agendas (such as increasing scores on PISA, economic growth, 21st century skills, diversity agenda of indigenous education). At the scale of Durango state, competencies equally accommodated (perceived) local development contexts and needs as well as national, state and global agendas.

Equally, in schools in Durango and Michoacan, competency education accommodated agendas of having to teach something in the classrooms with ideas about development and education quality, as I showed in Chapter 7. Thus, rather than thinking of global policy ideas such as competency-based education as stable ideas and practices, these policies transform. And rather than being 'imposed', competency-based education was adopted and adapted, because it accommodated both perceived global and national agendas, as well as different existing national agendas.

As shown in Chapter 6, as a floating signifier competency education carried enough meaning to be associated with economic growth, international competition, and socio-economic imaginaries of the global knowledge society, which clashed with the socialist imaginaries of the dissident teachers' union CNTE.

These findings suggest that the global can be thought of as a discursive and imagined field, which is unequally distributed. In Mexico this field is unequally distributed across scales (international, national, state, school), between contexts (states), and between groups (MoE, academia, SNTE, CNTE). In other words, the policy space that allows the global circulation of ideas and ideologies, or imaginaries, is unevenly distributed across scales and contexts (Rizvi, 2006, p. 201).

8.1.2 Key interpreters played a significant role in the interpretation and enactment of the competency-based curricular reform

The analysis also showed that during the processes of re-contextualisation of the Mexican competency-based curricular reform, key interpreters played an important role in interpreting and representing the reform differently, drawing on different discourses and imaginaries, which were linked to their interests. Key interpreters of the curricular texts were authoritative interpreters of policy (that is, at that scale or context many other education actors talked within that interpretation or discourse), and they were relied upon to relate the reform to

contexts, or to collectively undermine the reform. The different key interpreters claimed the 'right' meaning of competencies, and dismissed the meaning of others as 'wrong' or as ideologies. The politics of the re-contextualisation was thus about "ideological work" (Apple, 2008, p. XI), that is, the struggle to re-define the meaning of floating signifiers.

Chapter 3 showed that since the 1980s, international financial organisations, such as the OECD, played an important role in defining the meaning of competencies as necessary for integration into the global knowledge society. The application of standardised testing such as PISA, promoted a reduced approach to competencies. But over the years, the Mexican government started to include references to international education organisations such as UNESCO, to inform their interpretation of competencies, one that emphasised competencies for economic growth, but also emphasised the intrinsic importance of education. Moreover, UNESCO emphasises the importance of living together in society, diversity, and gender. The promotion within both the OECD and UNESCO of the idea of basic competencies, that is, the minimum knowledge, skills, and attitudes that all citizens need for life in modern society, shifted the focus in Mexico to competencies for basic education.

At the Mexican national and state scale in Durango, the MoE played a role as key interpreter of the competency-based curricular reform. I set out this argument in Chapter 5. The MoE tried to define the meaning of the reform in several ways, for example by emphasizing the continuity with prior Mexican curricular reforms, in an attempt to 'Mexicanise', or claim ownership of the reform. Also, the MoE tried to control the meaning of competencies 'vertically' towards the state and school scales, making efforts to disassociate competencies from the idea of competition by controlling the use of specific words (UNESCO instead of OECD) in teacher training texts, and emphasizing Perrenoud as an intellectual reference to the competency approach in the curricular reform. Also, teachers who had divergent meanings of competencies, for example those who doubted whether this would improve the quality of education, were considered by the MoE to be 'uninformed', and an obstacle for

increasing the quality of education, which delegitimised their interpretations or critiques.

However, despite the emphasis of the MoE on a 'holistic' competency discourse, the coupling of the approach at the national scale with evaluation of standardised content, led to a more 'narrow' approach, focussed on task analysis at the state and school scales, as I showed in Chapters 6 and 7. Thus, while discursively, (in the curricular texts, and in the way the MoE talked about the reform), a 'holistic' approach to competencies was promoted to counteract resistance, in practice, a more 'narrow' version was enacted, with the aim of increasing scores on the standardised tests PISA and ENLACE.

At the state scale in Michoacan, the dissident teachers' union CNTE played the role of key interpreter. As I argued in Chapter 6, they tried to define the meaning, for example, by preventing teachers from being trained to know and enact the reform.

The above analysis showed that the different scales of the trajectory can be thought of as interconnected, in line with Bowe et al. (1992), who suggest analysing the policy process as a non-linear and interactive trajectory, where the different scales of the trajectory are connected, and where information flows between them.

These different representations of competency-based education had different effects for the re-contextualisation at the different scales. For example, whereas at the Mexican national scale, the idea of competency-based education was promoted because it was able to accommodate different agendas, this was not the case at the Michoacan state scale of the trajectory, where it was rejected. I will flesh out this point about enactment within the political and material contexts in Sub-section 8.1.3 below.

8.1.3 The interpretations and enactments of the competency-based curricular reform were shaped differently within political and material elements between and within scales and contexts

Overall, I argued for the importance of paying attention to local complexities in order to understand what happens when curricular reforms are re-contextualised. The competency curricular reform was modified, transformed and resisted as it was interpreted and enacted in the different Mexican contexts. First, as demonstrated in Chapters 6 and 7, the competency reform entered very different state systems with particular dominant political and socio-economic ideologies. These represented a key filter in the adoption, transformation and resistance. The different representations of competency education can be explained by the political situation at the state scale.

At the national scale, competency policy ideas fitted within the neoliberal political agenda of the Mexican MoE and government. At the state scale in Michoacan, three periods could be distinguished in the education political configuration of actors and discourses that shaped the meanings, enactments, and resistances of competencies. The first period, at the beginning of the curricular reform processes, was characterised by rejection of national education policies by both the MoE and the dissident teachers' union CNTE, as well as permanent strikes by the CNTE. This gradually shifted towards a better communication and workability between the MoE and CNTE during the second period, which increased openness to national education reform. A third period, when the political colour of the state changed, was characterised by openness towards national education policy, and a break-down of the relation between the MoE and CNTE.

In the state of Durango, the reform was interpreted in a context that was aligned with the national MoE. The political situation was characterised by a close collaboration between the MoE and the teachers' union SNTE in the matter of pedagogical and education issues. The imaginaries of the competency-based reform resonated with the embedded imaginaries at the Durango state scale.

Secondly, I showed that whereas the reform was claimed by the teachers' union CNTE to be rejected at the state scale in Michoacan, enactments of the competency-based reform in schools differed from patterns at the state scale. This can be explained by the contexts in which teachers work. In Michoacan, teachers worked within an institutional structure that was not supportive of the reform, but at the same time they expressed the need to teach something in their classroom, which meant that despite their political and discursive rejection, most teachers were working with the textbooks of the new reform. Teachers navigated this complex context by distinguishing between the curricular texts, which represented the national reform which they rejected, and the textbooks, which they constructed as more practical or neutral tools. In Durango, different from the overall positive representation of the reform at the state scale, some teachers were critical of the reform. But because there was no organised opposition to articulate discourses of rejection that could back them up, or provide (the promise) of alternative education projects, the reform would not be critiqued openly at the scale of schools in Durango. Only those teachers backed up by the small teacher organisation COCOPO openly rejected the reform. But as they had not developed an alternative, they too worked with the textbooks of the reform.

The space for manoeuvre for state and school actors was also reduced by the national and state MoE to the minutiae of the competency-based education reform, such as for example the exercises that were interned to help the teacher achieve the expected learning outcomes (the development of which together aimed to result in the specified competencies). State and school scale actors were not given room for manoeuvre or space to influence in the choice for competencies as a model to increase the quality of Mexican education, the specification of the competency-based graduate profile and competencies for life, the importance of English and digital skills, nor the imaginaries that gave meaning to the curricular reform. Thus, although the MoE claimed the reform was participatory, this participation was limited to certain, perhaps, less important aspects.

In addition, teachers' interpretations and enactments of the reform were shaped by the lack of provision of information about competency-based education. In Michoacan, those teachers who wanted to implement the reform not only worked within a context that was largely unsupportive of the reform, they also experienced a lack of information about competency-based education and how to enact this in practice. In Durango, despite the political and discursive support at the state scale, teachers sometimes experienced that this remained at the level of talk, and that they did not actually receive much support. This was shaped not only by the lack of information about competency-based education and how to enact this in practice, but also because not all of their superiors were trained, or because they visited schools less than required. Within this context of scarcity of information, teachers had to find ways to enact the reform, which explained the different ways in which the competencies that were expected by the reform were developed.

Lastly, the focus on evaluation of competency practice by means of the standardised test ENLACE, the setting of curricular standards, and the coupling of ENLACE to teacher's pay, led to a focus on memorization as well as lack of attention to content that was not measured. This implied the enactment of a reduced version of competency-based education at the school scale. In Michoacan, this was part of the discourse of rejection of the reform, and initially teachers rejected the application of ENLACE in their schools. However, as the test was going to be tied to teachers pay during the implementation of the reform, increasingly teachers started to accept the reform.

This thesis also placed the understanding of the subjective interpretations of the competency-based reform within a set of "objective conditions, in order to make better sense of policy enactments" (Ball et al., 2012, p. 21). The material contexts of implementation, such as infrastructure or the existence of teaching material, mediated the translation of the competency curricular reform. For example, the focus of the national MoE on the standardised test ENLACE by coupling students' performance on the test to teachers' pay, was a tool to control the meaning or interpretation of competency-based education at the school scale in

a 'reduced' way, in that a focus on measurable elements shifted teachers' attention away from developing aspects that were not measured, such as gender values. This possibly fitted the agenda at the national scale of complying with international standards and outcomes measure as measure of quality of education.

Some education models, such as competency-based education, might work in consolidated, well-funded, highly professionalised, and well-regulated systems, with enough material and human resources, and technical capacities (Verger et al., 2012b). However, in the Mexican case, these conditions were distributed unequally over different contexts, such as rural and urban contexts. Although teachers found some room for manoeuvre to adapt the relevance of the reform to their contexts, for example, by bringing their own cell phones to replace computers, the way in which teachers were able to develop competencies was differently structured between contexts in which the materials were provided or not. This was mainly the case between rural and urban areas. This division was similar within Michoacan and Durango, which suggests that in addition to the different contextualisation of the reform *between* states, the reform also contextualised differently in rural and urban locations *within* states. However, whereas in Michoacan this became part of the discursive rejection of the reform, that is, the different materiality between rural and urban contexts and its effect on the shaping of competency education was represented as problematic, in Durango it did not.

The interpretation and enactment of the reform resulted in different and unequal consequences because of the differences in contextual capacity and cultural and political factors. The meaning of the competency-based curricular reform changed as it was displaced throughout the different scales, and as terms were taken from one discursive context and placed into another and given meaning within existing discourses and political and cultural elements of the scales. These elements were structured differently between the national, state and school scales, but also within the states. My research suggested highly

diverse competency practices, which in turn suggests an increase in differentiation of competency practices rather than homogenisation.

8.1.4 The competency-based curricular reform was contested in different manners

Throughout Chapters 5, 6 and 7, I argued that the Mexican competency-based curricular reform to primary education was contested in different ways, at the different scales and contexts.

First, the curricular reform was contested by challenging the dominant meaning of competency-based education at that scale (international, national, state, or school), as promoted by the key interpreter. This form I call discursive contestation. At the Mexican national scale, several education actors contested different elements of the version of competency-education that the national MoE promoted. For example, the Institute of Research about the University and Education (IISUE), challenged the idea that competency-based education should be taught to Mexican teachers in a 'directive' or top-down way. In another example, the dissident teachers' union CNTE contested the relevance of competency for the Mexican context, at both the national and state scale in Michoacan. Although most teachers in schools in Durango enacted the reform, this did not mean all teachers agreed with the need for a competency-based curricular reform. Some teachers thought it was not very relevant for the Mexican context.

Contestation also was enacted in a political form. This form of contestation did not take place at the national nor the Durango state scale. However, this was the dominant form of contestation at the Michoacan state scale, where the contestation of the curricular reform was enacted in the form of strikes, marches, graffiti, the occupation of MoE offices, putting pressure on the MoE, re-printing textbooks of the prior reform 1993, confiscating deliveries of new textbooks and obstructing teacher trainings in the reform.

At the scale of Michoacan state, contestation of the curricular reform also took an educational form; that is, in the form of alternative education policy processes (education congresses, teachers training), and an alternative education project. This finding is in line with (Arnaut & Giorguli, 2010, p. 200), who argue that the focus of CNTE in Michoacan resistance to SNTE domination has focused on creating parallel union committees, different to, for example, Oaxacan teachers, where the focus of struggle was against the institutional domination of the union committees.

However, a finding of my research was that, at the state scale, as well as the school scale in Michoacan, contestation also took the form of 'resistance within resistance' (or 'contestation within contestation'). For example, despite the prohibition of the dissident teachers' union CNTE to work with the reform, the teams within the state MoE in charge of implementing the reform (CEAS) resisted this directive and increasingly trained teachers. They sought alliances with the state and national institutional union SNTE as well as the national MoE, bypassing the state scale education politics and key interpreter. Moreover, teachers in Michoacan challenged the directive not to work with the reform, and my research found that although unofficial figures suggested that eighty per cent of the teachers were affiliated to the CNTE, teachers worked with the reformed textbooks in the classrooms. At the same time, the claim of the CNTE that their education project contested the curricular reform at the educational level, was complicated by the finding that an alternative curriculum (in the form of alternative textbooks) was only developed for year 1 and 2, most alternative 'holistic' schools were subject to conflict and not operational, and teachers within 'holistic' schools worked with the textbooks of the state reform. A conceptual difference thus needs to be made between discursive rejection, political rejection, and educational rejection (versus working with the different texts of the reform), in order to understand the complexities of the re-contextualisation of competency-based curricular policy Mexico.

Moreover, the notion of contestation needs to be understood within the light of the finding that the dissident teachers' union CNTE employed similar

mechanisms as the MoE and the teachers' union SNTE, such as the *marchometro*, which obliged affiliated teachers to participate in protests and strikes, and to prevent them from working with the state reform. This suggests that the CNTE made use of equally top-down mechanisms as those they critiqued, which questions the nature of their affiliated teachers' support for the resistance of the reform. In the re-contextualisation of the reform power works in complex ways, where actors can be subaltern in one case (CNTE versus national scale), while at the same time perform hegemonic roles to other groups (CNTE versus teachers).

The analysis showed that rather than speaking of resistance to education policy, policy researchers need to account for *different forms of resistance* or contestation in order to understand the complex realities of the re-contextualisation of education policy. My analysis of contestation has allowed me to agree with, for example, Street (2001) that the alternative teachers' union CNTE resists federal neoliberal policies discursively and politically. But my research suggests that the contestation only partially takes the shape of educational contestation.

8.1.5 Who benefitted?

Reflecting back on the initial interest in understanding whose interests were served by competency policy that motivated me to conduct research of the curricular reform, some reflections can be made. Firstly, adopting competency-approaches held the promise for those at the Mexican (sub)national scales who see it as an approach towards a better Mexico, by integrating Mexico in the knowledge economy. Supporting competency approach can also be explained at the level of individual goals and or benefits, for example, complying with the task of being a public servant, or obtaining additional benefits, such as in the case of the team of CEAS (stays in luxurious hotels in Mexico City). For the dissident teachers' union CNTE, the rejection of the reform not only fitted with

their ideas about a better Mexico, but the support from teachers also gave the union leadership political power at Michoacan state scale.

For teachers the picture is bleaker. Although some teachers believed the competency reform would improve student learning, their students' situation and perhaps even Mexico as a whole, for many the enactment of competency policies seems to be motivated by more practical motives. Supporting or rejecting the reform first acquired teachers the benefit of support from their teachers' union (SNTE in Durango and CNTE in Michoacan), which was essential for obtaining promotions, and other benefits. For many teachers, the adoption was the best of bad educational proposals (that of the MoE versus that of the CNTE), or the adoption was motivated by the practical choice of having to work with something in classroom. Teachers who scored high on ENLACE, also obtained benefits.

8.2 Theoretical reflections

In this section, I discuss how I add to the field of global education policies studies and policy trajectory studies drawing on post-structuralist theories.

8.2.1 'The global'

My analysis contributed two theoretical reflections to the idea of 'the global' in education policy studies.

First, my research showed that global policy ideas such as competency education, are as much about *national*, *state*, and *school* policies, processes and practices, as they are about *global* policies, processes and practices. For example, while the language of competency education discourse was adopted, a specific Mexican version was enacted which fitted and was made to fit with existing agendas and imaginaries at the (sub)national scales. To be more precise, a specific version of some actors, namely the national MoE, teachers'

union SNTE, and some groups of teachers, over a version of the dissident teachers' union CNTE and other groups of teachers was enacted. This means that while elements such as the signifier competencies, or an emphasis on 21st century skills (computer skills, English language skills) can be witnessed *around the world* (or globally), the minutiae of the way competency -based education was translated, such as the expected learning outcomes, or the ways in which these elements were supposed to be taught, were transformed in particular Mexican ways in the curricular reform to primary education at the (sub)national scale. The transformation was shaped by diverse *local* Mexican material and political conditions.

Second, during the processes of re-contextualisation of competency education the perception or representation of the global (that is, the imaginary) seems to be as important in shaping practices as the role of international agencies in the policy process. For example, much of the motivation to work with competency curricular policy for those in favour of it was shaped by the perceived promise it held to integrate Mexico in the perceived global knowledge society. Equally, the dissident teachers' union CNTE actively drew on perceptions of the global as being about the advancement of business interests and the loss of Mexican national and local characteristics for their contestation of the curricular reform. I showed how global imaginaries have become relevant in policy content and policy production processes by arguing that in the Mexican case, these education actors drew differently on global imaginaries in their interpretations and promotion of competency.

8.2.2 Beyond binaries

One of the characteristics of post-structuralist education policy research is a concern with complexity and attempt to challenge binaries. Policy education studies within this tradition challenge conceptual distinctions between the idea of policy-maker and policy implementer, and my research has shown that much of the competency policy was formed in the context of practice in schools.

Other categories that I have challenged are those of policy implementation versus policy resistance and education alternatives. The Mexican context shows that these distinctions are blurred in reality. For example, whereas the state of Durango is not seen as resisting national policy in the academic literature, many teachers discursively contested the need and relevance of the competency reform. These findings are important as they 'give voice' to experiences of education actors. At the same time, my research complicated the idea that Michoacan resists national education policy (cf. Arnout 2010), by showing that teachers did in fact work with the textbooks of the new competency-based curricular reform.

Moreover, I was interested in researching the contestation, resistance and alternatives of the dissident teachers' union CNTE to national Mexican education reforms that fit within neoliberal education policies. My findings show that the claim of the CNTE to being an alternative to state education policy, policy-makers and the teachers' union SNTE can be challenged as the dissident union made use of similar non-democratic forms, mechanisms, and systems of personal favours which they claimed formed part of the basis of their rejection of the state. In addition, the focus of the struggle of the dissident teachers' union CNTE was on the discursive and political form of contestation, and not on the development of education alternatives for all the years of primary education. Teachers experienced being caught within this vacuum. This finding challenges not only the academic category of alternative education, showing that practices were more complex, but also my own perception of the dissident teachers' union proposal as a viable alternative to neoliberal, undemocratically generated and irrelevant education policies.

8.2.3 The representation of the contexts of influence, text production and practice shaped enactment

My research has added to the field of global education policy studies by developing a policy trajectory study drawing on both post-structural and critical

realist ideas, and applying it in a Latin American context. Policy trajectory studies distinguish between contexts of influence, text production and practice to the policy process; what they research is what people say they do in the context.

However, my research showed that it is also the representation of the other contexts, or the imagined context, that shaped enactment. For example, although Durango and Michoacan show socio-economically similar contexts, in Michoacan this context is politicised by the key interpreter CNTE, by representing the reform as impossible and therefore irrelevant to implement in that context. Contrarily, in Durango, the socio-economic context was not politicised, by representing it as challenging but not impossible to implement the reform. In another example, the MoE imagined the contexts of education actors who have to apply the reform in a way that sometimes diverged from the experienced realities of actors in these contexts. Equally, the context of influences and practice were imagined by some education actors as a 'global knowledge society', which also diverged from Mexican reality.

8.2.4 Policy trajectory studies drawing on post-structuralist theories could be expanded with critical realist theories

Policy trajectory studies have mostly taken a post-structuralist focus, emphasizing complexity, messiness and transformation of policy processes. My policy trajectory study also followed the post-structural tradition of focussing on complexity and messiness of micro-level action and individual accounts. However, a limitation of post-structural research, is its inability to create structural 'grand' metanarratives of society, that is, patterned social arrangements in society that are both emergent from and determinant of the actions of the individuals. And while a post-structural focus on localised complexities and experiences allowed me to understand the lived experiences of the competency policy in local contexts, post-structuralism also has a tendency to relativize the 'interpretations of things' as the end of the story. Therefore, I have tried to account for the role of structural elements in the re-

contextualisation of competency reform, by adding a critical realist focus on how discursive, material and political elements of education actors' contexts shaped practices and processes.

My data adds to post-structuralist policy trajectory studies by suggesting that the re-contextualisation of the Mexican competency-based curricular reform resulted in different and unequal competency practices, due to contextual capacity and cultural and political factors which are structured differently between and within the states of Michoacan and Durango. My analysis moreover suggested that no curricular reform is able to improve Mexican pedagogical practices when confronted with the operational problems and structural inequalities of the education system.

8.3 Areas for further scholarly research

I have developed some meaningful insights into the complex relationships between global policy ideas, their dissemination and re-contextualisation in (sub)national Mexican contexts. At the same time, I raise some questions both as a result of my own limitations and from the way I theoretically and methodologically approached this research. In this section, I present some areas for future research that could further elucidate processes of re-contextualisation of policies that draw on global policy ideas, and particularly the competency-based curricular reform to primary education.

8.3.1 Competency practices and the context of outcomes

Whereas my research allowed me to add some meaningful insights to the policy studies field, I was not able to make claims in the educationalist or pedagogical realm. Further educational, pedagogical, or school ethnographic research is needed to understand the myriad different ways in which competency practices are (or are not) enacted and constructed in school contexts, in the interaction

between students and teachers, and how competency teaching is related to student learning.

Moreover, further structural sociological research and education research is needed to understand how the processes of re-contextualisation of the competency-based curricular reform produces education, economic, social, cultural effects, and how these are structured along class, gender, age, and socio-economic lines. This research should be carried out in order to ultimately answer the question, who benefits from competency-based curricular reforms *in the long run*. This type of research into “second order effect” (S. J. Ball, 2006, p. 51) could analyse competency policy in terms of its impact upon and interaction with existing inequalities and forms of injustice.

8.3.3 Participation

My thesis was motivated by an interest in the question whose voices and interests were reflected in competency-based curricular reform during the contexts of influence, text writing and practice. I added insights into how actors were positioned differently, which meant that some were more constrained than others to define the meaning. In a way, I made claims to participation in the education reform. However, I have not specifically engaged with academic literature that conceptualises participation in global education policy. Further research could compare the findings of the importance of understanding participation as the influence to define meaning of key signifiers in education reforms, which draw on critical theory, within the body of research on participation that takes a more realist point of view (for example, by understanding participation as the number of different education actors consulted for the development of curricular texts).

8.3.4 Political strategy

Initially for this research, I was interested in researching the contestation, resistance and alternatives of the dissident teachers' union CNTE to national Mexican education reforms that fit within neoliberal education policies. Throughout the research, the perception of the unions' actions as viable alternative to neoliberal education policies was challenged. Further research and effort should continuously be invested in the identification of a set of political and social activities which might more effectively tackle inequalities (Troyna, 1994, p. 73) for Mexican teachers and society as a whole.

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Appendices

Appendix 1: (Group)interviews

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOPO/ holistic	Date of interview	Place where interview took place
I-IN1	Individual	UNESCO Mexico	International			22.11.12	D.F.
I-IN2	Individual	OECD - Steering group on school leadership and teacher policy in México	International			25.12.12	Skype
I-NA1	Individual	Ministry of Education - Department of Teacher Professional Development	National			04.12.12	D.F.
I-NA2	Individual	IISUE	National			06.12.12	D.F.
I-NA3	Individual	SNTE - Director of Foundation for Teacher Culture	National			14.06.13	D.F.
I-NA4	Individual	Ministry of Education - Department of Curriculum Development	National			14.06.13	D.F.
I-NA5	Individual	INEE	National			14.06.13	D.F.
I-NA6	Individual	Ministry of Education - Department of Curriculum Development	National			14.11.12	D.F.
I-NA7	Individual	INEE	National			18.12.13	D.F.
I-NA8	Individual	Ministry of Education - Department of Curriculum Development	National			19.12.12	D.F.
I-NA9	Individual	Ministry of Education - Department of Indigenous Education	National			21.11.12	D.F.
I-NA10	Individual	IISUE	National			25.12.12	D.F.

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOPO/ holistic	Date of interview	Place where interview took place
I-NA11	Individual	Iberoamerican University - education policy researcher	National			More than 3x	D.F.
I-NA12	Individual	UNAM - education policy researcher	National			07.12.12	D.F.
GI-NA1	Group	Ministry of Education - Department of Educational Materials	National			04.12.12	D.F.
I-SC1	Individual	Teacher	School	Zitacuaro	Indigenous, Rural	02.05.13	Classroom
I-SC2	Individual	Teacher	School	Zitacuaro	Indigenous, Rural	02.05.13	Classroom
I-SC3	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	04.04.13	Classroom
I-SC4	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	05.05.13	Classroom
I-SC5	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	06.05.13	Classroom
I-SC6	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	06.05.13	Classroom
GI-SC1	Group	Teacher	School		Rural	07.02.13	Classroom
I-SC7	Individual	Teacher	School	El Oro	Urban	08.02.13	Classroom
I-SC8	Individual	Teacher	School	Morelia	Holistic & Rural	09.05.13	Classroom
I-SC9	Individual	Teacher	School	Morelia	Holistic & Rural	09.05.13	Classroom
I-SC10	Individual	Head-teacher	School	Morelia	Holistic & Rural	09.05.13	Classroom
I-SC11	Individual	Head-teacher	School	Morelia	Urban	09.06.14	Classroom
I-SC12	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	10.08.12	Classroom
I-SC13	Individual	Teacher	School	Durango	Urban	16.05.13	Classroom
I-SC14	Individual	Teacher	School	Durango	Urban	16.05.13	Classroom
I-SC15	Individual	Head-teacher	School	Durango	Urban	16.05.13	Classroom
I-SC16	Individual	Head-teacher	School	Tacambaro	Holistic & Rural	19.04.13	Classroom
I-SC17	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	19.11.12	Home
I-SC18	Individual	Head-teacher	School	Zitacuaro	Urban	24.04.13	Office

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOPO/ holistic	Date of interview	Place where interview took place
I-SC19	Individual	Teacher	School	Zitacuaro	Urban	24.04.13	Classroom
I-SC20	Individual	Teacher	School	Durango	COCOPO & Urban	25.01.13	Classroom
I-SC21	Individual	Head-teacher	School	Durango	Urban	25.06.14	Office, school
I-SC22	Individual	Teacher	School	Durango	Urban	25.06.14	Classroom
I-SC23	Individual	Head-teacher	School	Durango	Urban	26.06.14	Office, school
I-SC24	Individual	Teacher	School	Durango	Urban	26.06.14	Classroom
I-SC25	Individual	Teacher	School	Pueblo Nuevo	Rural	27.05.13	Classroom
I-SC26	Individual	Teacher	School	Pueblo Nuevo	Rural	27.05.13	Classroom
I-SC27	Individual	Teacher	School	Pueblo Nuevo	Rural	27.05.13	Classroom
I-SC28	Individual	Teacher	School	Tiquicheo de Nicolas Romero	Rural	28.04.13	Café
I-SC29	Individual	Teacher	School	Pueblo Nuevo	Rural	28.05.13	Classroom
I-SC30	Individual	Teacher	School	Pueblo Nuevo	Rural	28.05.13	Classroom
I-SC31	Individual	Teacher	School	Mezquital	Rural	31.05.13	Comedor
I-SC32	Individual	Teacher	School	Mezquital	Rural	31.05.13	Comedor
I-SC33	Individual	Teacher	School	Mezquital	Indigenous & Rural	31.05.13	Classroom
I-SC34	Individual	Teacher	School	Durango	Urban		Home
I-SC35	Individual	Teacher	School	Durango	Urban		Home
I-SC36	Individual	Teacher	School	Durango	Urban		Home
I-SC37	Individual	RETEM	School	Quiroga	Rural	30.04.13	Café
I-SC38	Individual	COCOPO	School	Durango	COCOPO & Urban	05.02.13	Café
GI-SC2	Group	Teacher	School	El Oro	Rural	07.02.13	Teacher training session
GI-SC3	Group	Teacher	School	El Oro	Rural	07.02.13	Teacher training session
GI-ST1	Group	Teacher	State	Morelia	Holistic & Rural	09.05.13	Schoolyard
I-ST1	Individual	Ministry of Education	State			20.05.13	Office
I-ST2	Individual	Ministry of Education	State			01.05.13	Restaurant
I-ST3	Individual	CEAS	State			03.05.13	Home
I-ST4	Individual	CEAS	State			03.05.13	Home
I-ST5	Individual	Ministry of Education	State			03.05.13	Home
I-ST6	Individual	Journalist	State			03.05.13	Café
I-ST7	Individual	Ministry of Education	State			03.06.13	Office, MoE
I-ST8	Individual	Ministry of Education	State			03.09.12	Home
I-ST9	Individual	SNTE	State			04.05.13	Restaurant

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOPO/ holistic	Date of interview	Place where interview took place
I-ST10	Individual	Ministry of Education	State			05.06.13	Office, MoE
I-ST11	Individual	Ministry of Basic Education - Department of Administration and Planning	State			06.06.13	Office, MoE
I-ST12	Individual	CEAS	State			06.06.13	Office, MoE
I-ST13	Individual	CEAS	State			06.11.12	Office, MoE
I-ST14	Individual	CNTE	State			07.05.13	Café
I-ST15	Individual	Ministry of Education - Department of Education Planning)	State			08.04.13	UPN, Morelia
I-ST16	Individual	Teacher Trainer	State			08.04.13	UPN, Morelia
I-ST17	Individual	CEAS	State			08.05.13	Café
I-ST18	Individual	Ministry of Education - Department of Indigenous Education	State			08.05.13	Café
I-ST19	Individual	Ministry of Education	State			09.06.13	Office, school
I-ST20	Individual	Holistic Schools Project Leader (for MoE)	State			09.12.11	Classroom
I-ST21	Individual	Mexicanos Primero	State			10.09.12	Café
I-ST22	Individual	CEAS	State			11.04.13	Café
I-ST23	Individual	Teacher trainer	State			11.06.13	Office, ENSM
I-ST24	Individual	Ministry of Education - Department of Indigenous Education	State			12.05.13	Home
I-ST25	Individual	Ministry of Education - Department of Education Planning	State			14.09.12	Café
I-ST26	Individual	Ministry of Education	State			17.04.13	Café
I-ST27	Individual	Mexicanos Primero	State			17.11.12	Restaurant

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOPO/ holistic	Date of interview	Place where interview took place
I-ST28	Individual	SNTE	State			18.04.13	Café
I-ST29	Individual	Holistic Schools Project Leader (for CNTE)	State			20.04.13	Café
I-ST30	Individual	Ministry of Education - Department of Indigenous Education	State			20.05.13	Office, MoE
I-ST31	Individual	Ministry of Education	State			21.04.13	Home
I-ST32	Individual	Teacher centre	State			21.05.13	Office, teacher centre
I-ST33	Individual	CEAS Preescolar	State			22.05.13	Café
GI-ST2	Group	Ministry of Education	State			23.01.13	Café
I-ST34	Individual	SNTE	State			23.04.13	Café
I-ST35	Individual	Ministry of Education	State			24.04.13	Office, MoE
I-ST36	Individual	Ministry of Education	State			24.05.13	Teacher training session
I-ST37	Individual	Ministry of Education	State			24.05.13	Teacher training session
I-ST38	Individual	Ministry of Education	State			25.02.13	Restaurant
I-ST39	Individual	CNTE	State			25.08.12	Café
I-ST40	Individual	Ministry of Education	State			26.04.13	UP, Morelia
I-ST41	Individual	Ministry of Education	State			27.05.13	Classroom
I-ST42	Individual	Ministry of Education	State			27.05.13	Classroom
I-ST43	Individual	Ministry of Education	State			28.05.12	Home
GI-ST3	Group	Ministry of Education	State			29.01.13	Office, MoE
I-ST44	Individual	Ministry of Education	State			29.01.13	Office, MoE
I-ST45	Individual	CEAS	State			29.05.13	Office, MoE
I-ST46	Individual	Holistic Schools Project Leader (for CNTE)	State			30.04.13	Café
I-ST47	Individual	Ministry of Education	State			31.01.13	Office, MoE
I-ST48	Individual	CEAS	State			31.01.13	Restaurant

Interview Unique code (IUC)	Interview type	Type of actor	Scale	Municipality in which school is located	Rural/ Urban/ Indigenous/ COCOP/ holistic	Date of interview	Place where interview took place
I-ST49	Individual	CEAS	State			01.05.13	Café
GI-ST4	Group	Ministry of Education	State			03.05.13	Restaurant
I-ST50	Individual	RETEM, representante CETE	State			05.11.12	CREFAL
I-ST51	Individual	Teacher trainer	State			07.06.13	Café
I-ST52	Individual	SNTE	State			10.05.13	Café
I-ST53	Individual	RETEM, representante CETE	State			10.09.12	Café
I-ST54	Individual	CNTE	State			29.04.13	Café
I-ST55	Individual	Normal School Teacher Trainer, Primary school teacher	State			08.05.13	Café
I-ST56	Individual	Ministry of Education - Teacher Training Department	State			11.02.13	Café
I-ST57	Individual	Ministry of Education	State			12.02.13	Café
I-ST58	Individual	Ministry of Education - Teacher Training Department	State			16.05.13	Café
I-ST59	Individual	Ministry of Education	State			16.05.13	Schoolyard
I-ST60	Individual	Parents Organisation	State			22.02.13	Office
I-ST61	Individual	Ministry of Education	State			25.05.13	Café

Municipality Morelia

Two schools were selected in the municipality Morelia: one urban school, and one 'holistic' school (dissident teachers' union CNTE alternative education project). This last one was located in a rural locality in the municipality.¹⁰⁸

The capital of Michoacan (Morelia) is located in the municipality of Morelia. The municipality is the largest population centre in the whole state (INEGI, 2011).

In terms of poverty, around forty per cent of the population of Morelia lived in poverty and six per cent in extreme poverty. Altogether, Morelia is the poorest municipality in the state of Michoacan by absolute numbers. Despite the fact that Morelia is the head of a culturally diverse state, the census reported only 0,5 per cent indigenous people. The city is also where the political and educative power resides as it houses the state congress and the public Universidad Michoacana de San Nicolás de Hidalgo, the first university in the American Continent, founded in 1540.¹⁰⁹

In Morelia, the average education of those above fifteen years old stands at 9.9 (INEGI, 2011).

Municipality Tiquicheo de Nicolás Romero

In the municipality Tiquicheo one rural school was selected.

The rural municipality Tiquicheo de Nicolas Romero, or Tiquicheo, is considered a poor area as eighty per cent of the population lived in poverty conditions and almost fourty per cent in extreme poverty (CONEVAL, 2012). Almost all households had access to water, sewage and electricity. However, only one out

¹⁰⁸ Schools were classified as urban or rural according to the classification used on: <http://www.microrregiones.gob.mx/>

¹⁰⁹ <http://www.umich.mx/historia.html>

of ten people had a computer and only seven percent had access to the Internet (INEGI, 2011). In the particular research site, there was only cell phone coverage at certain places next to the school and a specific point on the hill. People mainly communicated with walkie-talkies.

Tiquicheo lies in what is called Tierra Caliente region (hotlands), a rural region where several drug cartels are involved in cultivating drug crops and synthesizing drugs. The presence of drug trafficking in the municipality is part of everyday reality. During my presence in the village, pickups with gang members could be heard passing by the house at night. Burned down cars could be seen along the road. After 2012 the presence of the cartels diminished in the region.

Tiquicheo's average education years of people fifteen and above stands at five, in contrast to 7.5 at the state and 8.6 at the national scale (INEGI, 2011).

Municipality Zitácuaro

In the municipality of Zitácuaro one urban and one rural bilingual school were selected.

Zitácuaro is located to the east of the state of Michoacán and it is the fourth largest municipality in population. Four per cent of the population is indigenous (INEGI 2011). According to CONEVAL, six out of every ten people live in poverty, and one out of every ten lives in extreme poverty (INEGI 2014).

Zitácuaro's population above fifteen years old have in average 7.7 years of education, just above Michoacan's average of 7,6.

Municipality Puruándiro

In the municipality of Puruándiro one 'holistic' school was selected, which was located in a rural locality.

Puruandiro is located to the north of the state of Michoacan where 0.2 per cent of the population is indigenous (INEGI, 2011).

Poverty in the municipality is above sixty per cent, which means that the majority of the people cannot afford at least one basic need. Fifteen per cent lives in extreme poverty, which means that there are above 10,000 people that cannot afford at least three basic needs because of income according to CONEVAL (2012).

There are no indigenous schools in the municipality.

Municipality Durango

In the municipality Durango three schools were selected: two urban and one from the dissident union COCOPO (also located in an urban area).

Durango municipality has the highest number of population of the state of Durango. The state capital Durango is located in this municipality. Only 0.5 per cent of the people that live in Durango auto-identified as indigenous (INEGI, 2011).

Durango's poverty level is below the national and state average. CONEVAL reported that four out of every ten people could not afford their basic needs and five out of every hundred lived in extreme poverty (CONEVAL 2012).

In Durango municipality, the average schooling years per person above fifteen years old was 9.7, which is outstanding in comparison to the national and state scale.

Municipality El Oro

In El Oro three rural schools were selected.

El Oro municipality is located in the mountain range Sierra Madre Occidental, which complicates access. It has sixty-eight communities, and 0.7 per cent of the people are indigenous.

El Oro's poverty is above the national and state average with sixty per cent. Ten per cent of the total population lived in extreme poverty, according to CONEVAL (2012).

The average schooling years for people above fifteen years old is 7.6, which is one year less than the national average of 8.6.

Municipality Mezquital

In Mezquital, two rural schools were selected (one general and one bilingual)

In Mezquital municipality two rural schools were selected (of which one bilingual).

Mezquital is a small municipality where almost seven out of every ten inhabitants is indigenous. It is divided in eight hundred communities where Tepehuano, Huichol, Nahuatl and Cora indigenous languages are spoken. The whole municipality is located in the mountain range Sierra Madre Occidental, which complicates access.

The municipality of Mezquital is one of the poorest of the region: according to CONEVAL ninety percent of the people live in poverty and sixty per cent in extreme poverty. This means that almost nobody in Mezquital can fulfil at least one of their basic needs and the majority cannot fulfil at least three basic needs (CONEVAL, 2012).

Thirty percent of El Oro's schools are indigenous. The average years of schooling of people that are fifteen years or older is 4.9. This is almost four years below the average and half of the number of years in the city of Durango.

Municipality Pueblo Nuevo

In the municipality Pueblo Nuevo four rural schools were selected.

Three per cent of the total population of the state lives in Pueblo Nuevo in the north west, seven per cent of them identified as indigenous.

Pueblo Nuevo's poverty is very high, CONEVAL (2012) reported that almost seventy-five of the people in the municipality cannot afford to satisfy at least one basic need and one of every four lives in extreme poverty.

The number of schooling years of people above fifteen is 7.6, one year less than both the state and national average.