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Why Teachers?

In 1998, Marta Maffei, secretary general of the Confederation of Education Workers of the Republic of Argentina (CTERA), staged a hunger strike in front of Congress with hundreds of teacher-activists, many of whom were women from faraway provinces. This protest, known as the "White Tent," became a national spectacle, with artists, athletes, and media figures joining in to show solidarity with poorly paid teachers (Corrales 2004, 342–4; Campo 2020). Since Argentina transitioned to democracy in 1982, teachers articulated demands through protests, road blockages, and other demonstrations. Because of the White Tent, the government enacted a new law in 1999, Law 25,053, which created a new fund that improved the salaries of the worst-paid teachers. Maffei's role in the protest bolstered her leadership credentials and, in 2003, she was elected to the Chamber of Deputies with the center-left party Affirmation for an Egalitarian Republic (ARI). But after taking her seat in Congress, her stature diminished. CTERA fostered autonomous movements and grassroots activism. Teachers mistrusted and rejected union leaders who became politicians; instead, they relied on protests and direct action to voice their interests.

Thousands of miles away in Mexico City, Elba Esther Gordillo, the head of the National Union of Education Workers (SNTE), emerged from a private meeting with President Vicente Fox. It was May 15, 2001, the National Teacher Day. Mexico had recently transitioned to democracy, with the Institutional Revolutionary Party (PRI), the hegemonic ruling party, peacefully conceding power for the first time in seventy years. While Gordillo held high-ranking positions in the PRI, she negotiated directly with President Fox, even though he was from the center-right

National Action Party (PAN) (Loyo 2008; Ornelas 2008). Fox lacked a congressional majority and turned to Gordillo for help with his legislative agenda (Muñoz Armenta and Castro Maravilla 2019). President Fox negotiated with Gordillo, and the government agreed to generous terms; in 2001, teachers' salaries increased by 10.5 percent and benefits were adjusted upwards by 2.5 percent.[1] While the smaller and regionally rooted dissident faction of the Mexican teachers' union, the National Coordinator of Education Workers (CNTE), regularly protested, SNTE, the mainstay of teacher organizing, rarely, if ever, protested. Instead, the union negotiated alliances with parties regardless of ideology, providing political support for material benefits.

Finally, also in 2001, Gloria Inés Ramírez, the President of the Federation of Colombian Educators (FECODE), organized a massive rally in the Plaza Bolivar, the main square in the capital. In an op-ed, she railed against neoliberalism, criticized the government for barring access to public schools, and condemned the education reforms proposed by President Andrés Pastrana.[2] Ultimately, Ramírez was unable to block Law 715, which froze teachers' salaries and held down education spending. However, she launched a campaign for election to the Senate. Ramírez, who was a member of the Communist Party, mobilized teachers across the country to vote for the left-coalition Democratic Alternative Pole (PDA). In 2022, when Colombia elected its first leftist president, Gustavo Petro, she was appointed Minister of Labor. Ramírez is not unique: Leaders of FECODE were regularly major candidates and leaders of left-leaning parties. As a result, FECODE had close ties to these parties, and left parties emphasized teacher and education issues.

These snapshots are remarkable because they demonstrate a new form of labor politics. In all three countries, powerful labor leaders emerged who were women. In the past, few women worked in the leading industrial sectors. Most teamsters, longshoremen, autoworkers, steelworkers, and miners were men. In the United States, when women did work in these industries, they were segregated in the workplace and paid less (Milkman 1987). While women have been active in organizing movements in "pink-collar" professions, notably garment workers, flight attendants, nurses, and clerical workers (Cobble 2003), none of these unions gained political power. By contrast, women were the majority in the teaching profession and female leaders, with the backing of strong labor organizations,

[1] SNTE–SEP Agreement 2001.
[2] Gloria Inés Ramírez, "Educación vs lógica de mercado," *Semana* June 29, 2002.

became national figures. These leaders shaped education and labor laws, negotiated new partisan alliances, and pursued public office. Although gender-based inequality persisted in many teachers' unions, with women underrepresented in top leadership positions, teacher organizations often framed demands in terms of gender equity, furnished a space for feminist activists, and provided a pathway for women leaders to enter politics.

The significance of these three cases lies in the different strategies that the unions developed. Political strategies are fundamentally connected to *how* teachers mobilize. They can be defined as the practices and repertoires used to articulate interests, specifically the balance between protests and electoral participation. Labor politics are often described as either cooperative or adversarial (Murillo 2001; Burgess 2004; Lee 2011). But teachers demonstrate that union strategies differed in whether they prioritized protest or electoral mobilization and also in the character of partisan alliances. The strategies of teachers point to some of the broader changes in how groups in society articulate interests. In the aftermath of monumental changes to political and economic life in Latin America, social movements, interest associations, and labor unions inserted themselves into politics in various ways, giving voice to new interests (Collier and Handlin 2009; Kapiszewski et al. 2021). Indeed, these vignettes of teachers highlight the divergent paths of labor unions and social movements.

For labor unions, economic restructuring in the direction of open market competition generated a steep decline in membership. Labor unions thrived for much of the twentieth century as a result of state subsidies and union-friendly labor laws. They were disrupted by globalization and the neoliberal economic model. In countries with party systems that mobilized labor, trade union density fell sharply between the peak level of union density in the mid-twentieth century and the 1990s; according to Roberts (2014, 100), it fell on average by nearly sixteen points. Labor-based parties faced pressure to hold down wages, impose fiscal discipline, and control inflation. In some countries, economic openings in the 1990s went hand in hand with labor repression (Dean 2022). Even when leftist governments were elected throughout Latin America in the early 2000s, responses to union demands were uneven at best (Cook and Bazler 2013). Few would dispute that organized labor is now weaker than it was before the adoption of the neoliberal model (Kurtz 2004; Roberts 2014; Posner et al. 2018). Labor-based parties turned away from workers and recruited new voters, often from the less organized informal sectors, into their coalitions (Levitsky 2003). The generic story of labor unions is one of decline.

However, teachers did not experience the same disruption that many trade unions in Latin America experienced. By the late twentieth century, public school teachers emerged in many (if not most) parts of the world as the largest and most politically active group of workers. Indeed, as economic restructuring in the 1990s resulted in mass layoffs for many industries, teachers saw continuous hiring as governments pushed to universalize primary school enrollment and achieve significant gains in secondary school enrollment. By the time democratization swept the world in the 1980s, teachers were an organized group that forcefully pressed demands. The rise of teachers' unions marked the ascendancy of white-collar public-sector workers and the decline of blue-collar industrial workers. Indeed, the ascendancy of teachers suggests that scholars should pay more attention to other public sector workers (e.g., health workers and public employees) and workers in nontradable sectors (e.g., teamsters) that have become prominent in some countries. The strategies of teachers seemed to deviate from those of industrial workers: Teachers exhibited relative autonomy from the state, contentious mobilization and protest, and novel partisan alliances.

For social movements, democratic transitions afforded opportunities to mobilize around new issues and identities. More inclusive regimes, an expansion of rights, and new participatory institutions created space for emerging groups to assert material interests, such as high school and university students (Donoso 2016), informal sector workers (Garay 2017), and AIDS activists (Rich 2019). In addition, new groups organized around social identities, demanding new rights and political recognition: indigenous and Afro-descendant communities (Van Cott 2005; Paschel 2018), feminists (Baldez 2002; Daby and Mosley 2022), and LBGT+ activists (Corrales 2021). Like teachers, new social movements organized protests, formed new alliances with parties, or engaged in both strategies. Democracy enabled many groups in society to shape policy and consider strategies that included routine and contentious politics (Rossi and von Bülow 2016).

This book uses the case of teachers to explore why ascendant labor unions and new social movements developed different strategies. Teachers fell somewhere in between labor unions and social movements. As for other labor organizations, "second-generation" reforms posed a challenge to teachers because these policies, which included reforms to improve efficiency and service quality in the public sector (after "first-generation" macroeconomic stabilization reforms), threatened labor rights (Navia and Velasco 2003). But, as social movements did, teachers

TABLE 1.1 *The size of teacher organizations*

Country	Total population (2021)	Largest teacher organization	Number of members	Teachers led national labor or popular sector organization?
Argentina	46 million	CTERA	320,000	Yes (CTA)
Brazil	214 million	CNTE	1 million	Yes (CUT)
Colombia	52 million	FECODE	270,000	Yes (CUT)
Chile	19 million	Colegio de Profesores	100,000	Yes (CUT)
Mexico	127 million	SNTE	1.2 million	Yes (CNOP)

Sources: World Bank; Chiappe 2012; FECODE "Quienes Somos," accessed November 30, 2022 via https://fecode.edu.co/quienes-somos/; Inter-American Development Bank 2019; Secretaria de Educación Pública 2020

engaged in energetic forms of mobilization; in some cases, teacher movements drew attention to issues of teaching and pedagogy (Pulido Chaves 2007), professionalization and training (Finger and Gindin 2015), and democratic reforms (Cook 1996). Teacher protest movements emerged in parallel with other protest movements that demanded material benefits as well as rights and recognition.

Comparative research on interest representation from the standpoint of teachers' unions, currently the most powerful labor organization in many (if not most) countries worldwide, is overdue. While in recent years growing interest in education politics has drawn attention to teachers' unions, few studies have undertaken a sweeping comparative and historical analysis of them. This research aims to do just this. Teachers' unions bring together public school teachers at the primary and secondary levels (and sometimes at the preschool, technical levels, and teacher college levels), but rarely organize workers in private schools and universities. Teachers usually have a single national organization or a large, dominant federation that is the primary vehicle for representing interests. When surveying Latin America, countries such as Argentina, Brazil, Chile, Colombia, and Mexico each have a teachers' union that brings together hundreds of thousands of dues-paying members, translating into substantial resources to finance campaigns and build a voting bloc (see Table 1.1). Because teacher organizations maintained robust member bases (while other trade unions lost members), teachers headed national labor federations. As political rights expanded, teachers gained power

because parties wanted to benefit from their organizational clout (Nelson 2007, 85). Owing to their organizations' size and salience, teachers now play a prominent role in interest group politics and party systems.

THE MAIN ARGUMENT

Contemporary economic and political changes opened new strategic options for teachers, as they did for other social movements and public sector unions. This book conceptualizes three distinctive strategies of teachers' unions and then explains why they were adopted using a comparative-historical analysis of Argentina, Colombia, and Mexico. Why did national teacher organizations develop different strategies – with contrasting emphases on protest versus electoral mobilization and divergent relationships with political parties? As the introductory vignettes suggest, some teachers' unions exert pressure on politicians by subjecting them to the threat of disruptive protests. This pattern, which I call "movementism," is present in countries such as Argentina, Bolivia, and Peru, where teachers have been at the forefront of labor conflict. In Colombia and Chile, teachers also protested, but their main strategy of interest representation involved strong ties to left-leaning parties, or "leftism." Finally, some teachers constructed alliances with successive parties, a strategy that I call "instrumentalism." In Mexico, and also perhaps Indonesia, union leaders exchanged political support for common points of agreement with whatever party was in power.

My explanation for these outcomes depends on the answer to two organizational questions. First, do unions form political alliances, or do they avoid party politics and engage in strategies of protest? Second, if they make alliances, are these alliances ideologically consistent, or are they instrumental and shifting? For the former, I demonstrate that *hierarchical relations* within unions are necessary for negotiating partisan alliances since these relations give union leaders the capacity to deliver a bloc of votes in exchange for political representation. To this end, national union leaders need a chain of command in which local union leaders who can mobilize teachers' votes follow orders. Unions with weak hierarchies, by contrast, cannot dependably mobilize voters, and instead deploy strikes and other forms of labor militancy to press demands.

Second, I show that the dynamics of *factional competition* shape different kinds of partisan alliances. Competition among factions leads unions to align with the left because rival factions maneuver to outbid one another in appealing to the base. This dynamic makes alliances with

left-wing parties likely. By contrast, when a single faction is hegemonic, union leaders establish instrumental alliances, throwing their support to the party that makes the best offer at a given time, even if such support is unpopular with the base. A hegemonic faction makes the union leadership autonomous from the rank and file because rival leaders and dissenting voices lack any real power to contest such opportunistic behavior.

The focus is on the ways that organizational structure has consequences for political behavior. But I go on to identify how teacher organizations developed in relation to the state, how union leaders accumulated resources, and what the distinguishing traits are that characterize unions across countries. The analysis uncovers the historical origins of organizations in the mid-twentieth century and their subsequent development. Important features of unions, especially the characteristics of union factions, were set during the 1950s, 1960s, and 1970s. But I also highlight the 1980s as a period when teachers in Argentina, Colombia, and Mexico took advantage of democratic openings to unleash robust movements and demand an end to the austerity measures set during the "Lost Decade" or debt crisis of the 1980s, when governments could not make payments on their sovereign debt. During the early 1990s, policymakers responded to teacher movements in different ways across countries, as economic conditions improved. These responses also shaped the organizational traits of unions. When policymakers distributed subsidies, improved teacher salaries, and offered resources to national union leaders, they inadvertently helped to centralize labor organizations and consolidate factions in unions. By contrast, policymakers could also respond by ignoring teacher demands and undermining union centralization by withholding subsidies and freezing education spending. This weakened national union leaders and dispersed power to an activist base. In other words, I approach labor organizations by examining how they are embedded in the state. Teachers' unions are situated in different policy frameworks and institutions, which has helped to define the character of union organizations.

THE NORMATIVE DEBATE: TEACHERS, EDUCATION REFORM, AND LABOR ACTIVISM

A focus on teachers' unions' strategies informs discussions of the forces behind labor and education policy. In policy circles, in the media, in the business community, among private foundations, and in universities, teachers' protests and electoral participation have generated debate – and

sometimes outrage. Teachers' unions have played a leading role in shaping landmark education legislation. Union leaders drafted articles that were included in the General Law of Education in Colombia in 1994 and the National Law of Education in Argentina in 2006, among others. Such laws were important milestones for establishing national standards for the career ladders and pay scales of the teaching profession. Against the backdrop of these laws, scholars have criticized unions for focusing narrowly on labor issues and establishing standards that were too uniform and not oriented toward improving teacher professionalism or promoting effective pedagogies. Other scholars, however, have defended teachers' unions as playing a vital role in democratic engagement and education policymaking.

Indeed, there are sharp disagreements. Some economists and political scientists argue that teachers' unions are "vested interests" or entrenched interest groups that are a pernicious obstacle to education reform (Bruns and Luque 2014; Moe and Wiborg 2017). Teachers have been construed as labor market insiders that advocate for narrow economic interests (i.e., rent seeking). Even if teacher salaries in Latin America are often modest, teachers enjoy other benefits, such as job security and a work schedule that affords them the possibility of taking a second job, as well as health insurance and a guaranteed pension (Elacqua et al. 2018, 20). Although the profession has lost prestige, it affords teachers advantages that other workers do not have. In this account, distributional politics can be seen as zero-sum. Increasing teacher salaries increase pension liabilities, which squeezes budgets that could be otherwise used to address more pressing problems (Anzia 2022). In the Latin American context, where social policies are highly segmented (Arza et al. 2022), teacher demands for higher pay may exacerbate the segmentation between the formal and informal sectors.

Vested interests can be an impediment to better public schools. Citing Latin America's low rankings on international standardized tests such as the Program for International Student Assessment (PISA) in the subject areas of math, reading, and science, scholars and policy observers have argued that teachers' unions block reforms that would incentivize innovation in teaching and generate better learning outcomes and problem-solving skills (PREAL 2006). As Latin American countries strive to compete in the knowledge economy and escape the "middle-income trap," union opposition to new teacher career structures, performance-based pay, and more rigorous evaluations – policies to upgrade and professionalize teachers – indicate that teachers' unions defend the status

quo (Doner and Schneider 2016). Indeed, Finger (2018), in her statistical analysis of states in the United States, shows that stronger teachers' unions are associated with a lower likelihood of performance pay policies. Some conclude that teachers' unions operate like labor organizations with economic interests rather than like professional associations that care whether students learn basic knowledge and skills (Moe 2011).

The political participation of teachers can have negative externalities. In developing democracies with weak institutions, teachers may mix their official capacity as public servants with work for political campaigns and inappropriately influence parents and students. Given widespread patronage politics in low- and middle-income countries, teachers' unions may become political machines, and they may contribute to problems such as clientelism in teacher transfers and promotion and the hiring of teachers in the run-up to elections (Duarte 2003; Pierskalla and Sacks 2020; Schneider 2022). Moreover, participation in protests exacerbates teacher absenteeism. In Argentina, students regularly miss weeks and sometimes months of instruction each year because teachers are on strike (Carnoy 2007, 113).

There are other perspectives in the literature, however. Teachers' unions may use their expertise to block misguided education policies that do not benefit students. Sociologists and education scholars have defended teachers' unions, arguing that they mobilized against policies that harm children, such as excessive standardized testing and poorly regulated charter schools (Ravitch 2013; Bascia 2016). Teachers have been critical of school choice and accountability policies that problematically use standardized test scores to measure teacher quality. They argue that these policies conceptualize learning in a mechanical and superficial way, ignoring other important dimensions of teaching such as encouraging student motivation, curiosity, and socioemotional growth. If teachers have been reluctant to embrace a narrowing of focus on skills and drills, they have advocated on behalf of more inclusive public schools and services that benefit students and communities (Lavery 2020).

Further, some evidence shows that teachers' unions do not exert influence on policy. Paglayan (2019) finds, using longitudinal data and rigorous econometric models, that in states in the United States where teachers have laws that legalize collective bargaining there is not a consistent effect on the increase in the size of government. In other words, teachers' unions may oppose policies that make schools worse, and they may have little influence on policy.

The political action of teachers may also generate positive externalities. With a diminished labor movement and rising socioeconomic inequality, teachers can articulate demands that benefit other workers. In Argentina, the labor central that was founded by leaders of the teachers' union, the Argentine Workers' Central (CTA), was crucial for the formation of an "insider–outsider coalition" that brought together organized labor and informal sector workers (Garay 2023). In the United States, teacher mobilizations engender broad public support for teacher actions and also for labor mobilization more generally (Hertel-Fernandez et al. 2021), and teachers may serve as a linchpin for progressive coalitions (Lyon 2023). Barnes et al. (2023) have shown that more working-class representation in national legislatures in Latin America improves perceptions of democratic legitimacy through descriptive representation and policy responsiveness. If teachers are, indeed, lower- and middle-class workers, then teacher representation in the legislature may bolster the articulation of nonelite interests.

For scholars who prioritize equity and inclusion, teacher organizations advocate for a model of education that is centered on promoting the holistic development and well-being of children – beyond learning as measured by PISA scores. Teachers, as ordinary citizens with expertise in pedagogy, have a right and even a duty to participate in debates about public education. This is particularly true in new democracies, where authoritarian regimes have excluded them from politics and violently repressed demands for basic labor rights. Indeed, the teaching profession has faced violations of human rights in Argentina, Colombia, and Mexico. Colombia stands out as a troubling case. Between 1977 and 2015, over 1,000 teachers have been confirmed killed and more than 10,000 have faced death threats.[3]

Debates about whether teachers' unions are good or bad for democracy and whether they help or harm public schools are ongoing and unresolved. Indeed, my conclusion is that teachers, like other sectors of labor, are akin to the "contingent democrats" described by Bellin (2000), and that the answers to these questions should be analyzed in relation to material interests and the state, which vary across countries and time. I add nuance to such debates by illuminating how the answer may also depend on the strategies of teacher organizations. In some instances, teachers are reformist outsiders who draw attention to fundamental

[3] Ángel Pérez, "Las amenazas a los profes y la perpetuación de la violencia en Colombia," *Semana* July 15, 2018.