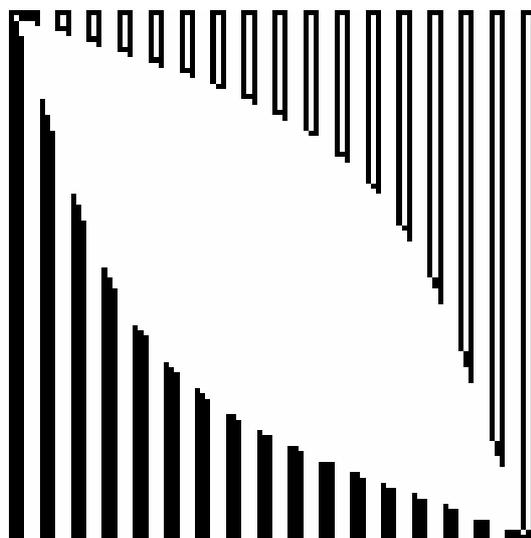


THEMATIC REVIEW ON ADULT LEARNING



MEXICO

COUNTRY NOTE

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1. OBJECTIVES AND ORGANISATION OF THE THEMATIC REVIEW

1. The main purpose of the thematic review on adult learning is to understand adults' access and participation in education and training and to enhance policies and approaches to increase incentives for adults to undertake learning activities in OECD countries. It is a joint activity undertaken by the OECD Education Committee (EDC) and the Employment, Labour and Social Affairs Committee (ELSAC) in response to the need to make lifelong learning a reality for all, to improve learning opportunities of low skilled, disadvantaged adults and sustain and increase employability.

2. A total of 17 countries will have participated in the thematic review: 9 countries in the first round (1999-2002) and 9 countries in the second round (2003-2004). All related documents, Background Reports and Country Notes are publicly available on the OECD adult learning website (<http://www.oecd.org/edu/adultlearning>) and constitute a valuable source of information for international comparison. A comparative report providing an analysis of adult learning participation and policies as well as good practices and recommendations in the first 9 reviewed countries was published in 2003 (OECD, *Beyond rhetoric: Adult learning policies and practices*, Paris).

3. Countries participating in the second round of the thematic review have chosen between two options: A full-scale review covering adult learning in a comprehensive view or a focused review addressing adult learning of the low-skilled and disadvantaged adults. From the nine countries participating in the second round, four have opted for the full-scale review (Austria, Hungary, Mexico, Poland), and five for the focused review (Germany, Korea, Netherlands, the United Kingdom and the United States).

4. The thematic review methodology includes national analysis and cross country comparison. Countries prepare a descriptive Background report on the status of adult learning in the country. It is followed by an OECD review team visit to the country that enables the reviewers to analyse adult learning on the basis of the Background report, discussions with representatives of government, administration, employers, trade unions, practitioners and site visits. After each country visit, the team rapporteur, with the help of the review team, prepares a Country Note analysing the main issues concerning adult learning and policy responses in the country under review. The Country Note addresses four major themes: purposes and priorities for adult learning; incentives to make learning more attractive to adults; improving quality and efficiency of learning and policy coherence. A final comparative report will address some of the different issues and policy responses in a comparative perspective, including the insights gathered from the participating countries.

2. THE GENERAL CONTEXT OF ADULT LEARNING IN MEXICO

5. Mexico, officially named Mexican United States, is a federal republic made up of 31 states and federal district, Mexico Distrito Federal (in English, Mexico City). The Mexican political landscape was shaped by the Revolution of 1910, and all subsequent governments have had to contend with a society characterised by vast economic, social and cultural diversity. The need to foster national consolidation has resulted in a centralised system of government with strong federal institutions and a relatively weak capacity for economic and social policy development at the state and local levels. In recent years, there has been a movement toward greater decentralisation of programmes giving states and municipalities more control over allocation of resources. As a result, there are growing conflicts between federal and provincial responsibilities about adult learning – an issue we will return to throughout the report and section 3.2.2 in particular. During our review we were only able to visit two states; Aguascalientes and Chiapas. These two states offer widely contrasting social and economic contexts for adult learning and illustrate the diversity of Mexican society and the division between the prosperous, modern north and the less developed south. However, the reviewers are cognisant of the fact that there are particular local features that were unable to be accounted for in this review.

6. In the 2000 presidential election, the Institutional Revolutionary Party (PRI), in power for 71 years, lost to Vicente Fox and the National Action Party (PAN). President Fox came to power on a platform that promised broad social and economic reforms aimed at addressing the country's extensive poverty. An improvement of the population's human capital is at the core of this strategy. It is in this context that we assess the capacity of present and planned adult education and training strategies in Mexico.

7. The Thematic Review of Adult Learning in OECD countries focuses primarily on the individuals aged 25-64 years. In the context of Mexico this fails to account for a large group of young people aged 15-25 who left school before completion and are gainfully employed. Therefore, this review covers ages 15 and above in accordance with the General Education law that defines adult education as education for individuals aged 15 and older who have not attended or completed primary education.

8. As a background to the analyses of the adult education and training system we will begin with a brief overview of the challenges to adult learning posed by the structure and inefficiencies of the Mexican economy, the prevalence of poverty and the shortcomings of the formal educational system.

2.1 The Mexican economy

9. In the literature Mexico has alternatively been portrayed as a model of market driven economic restructuring or as a cautionary example of the problems and limitations associated with a market-led development strategy (Middlebrook and Zepeda, 2003, p 3). Since the mid-eighties Mexico has pursued an aggressive free trade agenda. Mexico joined the General Agreement of Trade and Tariffs, now the World Trade Organisation in 1993, and signed the North American Free Trade Agreement (NAFTA) with Canada and the United States in 1992. Thus, the economy has evolved from one that was state dominated and protectionist to one of the most open in Latin America. There has been a change in Mexico's export profile from one with a dominance on primary products to one with a larger dependence on manufacturing goods. The latter increased from 17 per cent of the GDP in the early 1990s, to 30 per cent today. An important component of this phenomenon is the 'maquiladoras' (in-bond industries) made up of assembly

plants working in virtually tax free zones for re-exporting. From their original location on the northern border, they have spread to central and southern regions, illustrating Mexico's growing interdependence with the United States and its reliance on large trans-national companies. The expansion of maquiladoras since the middle 1960s has recently come to a halt. This is partly due to a slow down in the American economy, but there are also more serious structural factors at play. Mexico is losing business from some of its foreign owned assembly plants as they relocate to countries that offer lower labour costs, China in particular. Because of its lack of skilled workers, Mexico has a limited capacity to replace lost manufacturing jobs with more highly skilled jobs. A lack of investment in education situates Mexico among manufacturing countries that have a combination of relatively high production costs and a workforce with relatively low-level skills (*Economist*, July 24, 2003).

10. Despite substantial structural reforms and improved economic performance during the 1990s, Mexico's growth performance has been insufficient to combat poverty. Throughout the 1990s, GDP per capita increased by only 1.6 per cent per year, compared to 3 per cent or more in countries like Greece, Portugal and Korea, which like Mexico, have comparatively low income levels (OECD, 2003a). Even when employment and output of the informal sectors are excluded from the productivity calculation, gains remain weak. Positive contributions from relatively high employment growth, 5 per cent per year since the late 1980s, have been largely offset by weak gains in productivity.

11. Contrary to expectations, the manufactured-export sector has not generated rapid sustained growth in the economy as a whole (Middlebrook and Zepeda, 2003, p. 27). Only about one per cent of the inputs required by the export plants are currently produced in Mexico. The domestic economy, particularly in the midsize and small business sector - has languished as a result of inadequate domestic demand, which is linked to severely depressed wages for workers during the last two decades. The Mexican economy also suffers from economic stagnation in the agriculture and livestock sector, which has not been able to maintain its competitiveness under the free trade arrangements. The sector has been suffering from an under-investment in technology, a lack of administrative and business skills among the local producers and an erosion of social capital in rural areas.

12. The Mexican labour market was characterised by a vast informal sector of approximately 10.5 million persons in 2002. If people who are employed by enterprises or households, working without a contract or receiving no payment are also included, the size of the informal sector is estimated to be as high as 18.5 million, representing almost half the total national employment (OECD, 2003a). The burgeoning informal sector is a result of the inability of the formal economy to produce enough jobs for the growing population. The growth in the informal sector is partly fuelled by migration from rural areas to urban centres and also by an absence of income support for those who can not find jobs in the formal sector. The very large informal sector also reflects the suppressed incomes in the formal sector and low opportunity costs of self-employment (Maloney, 2001).

13. The traditional pattern in most OECD countries suggests that unemployment rates vary with levels of educational attainment (OECD, 2003b, p. 151). This is not the case in Mexico, where the economy's vast informal sector with its low skills demand helps explain why the official unemployment rate is low (1.6 per cent in 2001) and does not appear to vary much with regard to gender, age or educational attainment. Salas and Zepeda (2003, p. 524), borrowing a phrase from Gunnar Myrdal, note that unemployment is a luxury few can afford. There exist, however, marked gender differences in labour force participation, particularly among those with less than an upper secondary education. In 2001, for example, the average participation rate for males was 94 per cent and showed little difference with regard to level of education. For women, the average participation rate was 43 per cent. Participation rates for women, however, vary from a low of 37 per cent for those with less than an upper secondary education to a high of 70 per cent for those with a tertiary education (OECD 2003b, p. 150).

14. Low earning among the working-age population is at the root of the Mexican poverty problem. The policy ambition is to try to correct this through a human capital strategy that would facilitate a shift in employment opportunities from the informal to the formal sector of the economy.

2.2 Poverty

15. In official Mexican public policy statements, poverty reduction is portrayed as the ultimate objective of economic development. Despite various policy strategies aimed at combating poverty over many years, the greatest challenge for Mexico still remains one on how to significantly reduce the high levels of poverty and improve social inclusion in the country. Boltvinik (2003, p. 385) identifies six sources that decide an individual's and/or a household's welfare: current income, basic assets (housing and consumer durable goods), non-basic assets (including a household's borrowing capacity), access to publicly provided goods and services (water-sewage-electricity, education, health care and social security), free time and knowledge. In the last decade, income poverty fluctuated while more specific poverties, including education, decreased. Income improvements have been hampered by poor labour market performance. As in the rest of Latin America, significantly more progress has been made on improving the capabilities of the poor than of improving their economic opportunities (Ruprah, 2003, p.45). Boltvinik's conclusion is that over the last 20 years, overall opportunities for social welfare not only failed to increase, but actually dropped (op.cite., p. 399).

16. In the year 2000, about half the population suffered from various degrees of poverty (SEDESOL in CONEVyT, 2003):

- level 1 (24.2 per cent of the population in 2000): households with an income insufficient to cover basic food necessities, according to the nutrition requirements established by the Instituto Nacional de Estadística Geografía e Informática (INEGI-CEPAL) food basket (*Linea de Pobreza*);
- level 2 (31.9 per cent of the population in 2000): households with an income per capita insufficient to satisfy basic food, health and educational consumption (*Linea de Pobreza Capaciades*); and
- level 3 (53.7 per cent of the population in 2000): household income is not sufficient to satisfy the basic consumption of food, clothing, shoes, housing, health, public transport, education and other goods (*Linea de Pobreza Patrimonio*).

17. Extreme poverty is particularly common in the rural areas of Mexico, where 42.4 per cent of the population has an income that is insufficient to cover basic food necessities, compared to only 12.6 per cent among those living in urban areas. However, mainly as a result of migration, the absolute number of people living in poverty is now higher in urban areas, 32 million compared to 22 million in rural areas, 60 per cent of whom are women (SEDESOL, op. cite).

18. The situation is particularly precarious for the Indian population in Mexico, of whom 80 per cent are living in poverty. Only 17 per cent of the indigenous populations have access to safe drinking water, and seven per cent of households have more than two minimum wage salaries (SEDESOL, op. cite).

19. The slow progress on poverty reduction in Mexico, as in the rest of Latin America, appears to be tied to the high levels of inequality and can be seen largely as a distributive problem (Franko, 2003). In 2000 the poorest 10 per cent of the Mexican population earned only 1.5 per cent of the income while the richest 10 per cent accumulated as much as 42.8 per cent of earnings and consumer goods. Over the last 20 years there has been a trend to greater income concentration which has occurred in periods of both economic stagnation and recovery (Boltvinik, 2003, p. 403). As education is seen as a key to promoting

equitable sustainable growth, and no Latin American country has made significant economic progress without a strong educational infrastructure (Franko, 2003), it is important to understand the interrelationship between economic and educational inequalities, (see table 1).

Table 1. Average years of education for twenty-five-year-olds, by income decile

	Over all	1	2	3	4	5	6	7	8	9	10
Argentina	9.44	7.04	7.48	7.74	7.71	8.52	8.82	8.99	9.91	11.13	13.57
Bolivia	8.80	5.96	6.45	7.23	7.67	7.58	8.32	9.15	9.29	10.38	13.12
Chile	8.79	6.24	6.88	7.09	7.40	7.69	8.16	8.47	9.80	10.88	12.83
Panama	8.68	4.31	5.36	6.30	7.07	7.53	8.16	8.78	9.90	10.88	13.57
Uruguay	8.02	6.03	6.31	6.54	6.49	6.79	7.34	8.00	8.68	9.74	11.87
Peru	7.20	3.87	4.17	4.95	5.69	6.60	7.05	7.66	8.28	9.04	10.80
Venezuela	7.15	4.66	4.94	5.27	5.72	6.23	6.68	7.20	7.78	8.58	10.81
Ecuador	7.12	3.39	4.39	5.07	5.61	5.64	6.85	7.74	8.23	9.19	11.83
Costa Rica	6.94	4.08	4.88	5.39	5.54	5.91	6.31	6.75	4.65	8.62	11.53
Mexico	6.23	2.14	2.95	3.78	4.15	4.78	5.66	6.06	7.24	8.89	12.13
Paraguay	6.06	3.37	3.67	3.88	4.59	4.81	5.46	5.96	6.62	7.88	10.72
Brazil	5.22	1.98	2.49	2.97	3.41	3.66	4.40	4.99	5.98	7.43	10.53
El Salvador	4.88	1.63	2.14	2.40	2.75	3.27	3.99	4.73	5.90	7.11	10.27
Honduras	4.74	2.07	2.33	2.47	3.06	3.59	3.90	4.70	5.76	6.86	9.58
Nicaragua	4.74	2.17	2.05	2.65	3.33	4.11	4.55	4.94	5.46	6.46	8.49
Average	6.93	3.93	4.43	4.92	5.35	5.78	6.37	6.94	7.57	8.87	11.44

Source: Partnership for Educational Revitalization in the Americas, *Lagging Behind: A Report Card on Education in Latin America*, 2001, Table A.12 (as reported in Franko, 2003, p. 412).

20. Table 1 provides information on average years of education for twenty-five-year-olds, by income decile. The data indicates that Mexico has one of the most unequal educational distributions in Latin America and that the inequalities are closely linked to disparities in income distributions. Twenty-five year-olds in the bottom 10 per cent of the income population have 2.14 years of schooling as compared to 12.13 years among those in the top 10 per cent. Looking at the Latin American averages, the corresponding figures are 3.93 and 11.44. In Uruguay, the Latin American country with the smallest economic inequalities - the equivalent difference between those in the wealthiest 10 per cent and the poorest 10 per cent is substantially smaller, 6.02 versus 11.87. In the next section we look more closely at the changing nature of adult education poverty in Mexico.

2.3 Educational poverty and demand for adult education

21. Education in Mexico is governed by the Federal Education Law (*Ley Federal Educación*), which stipulates that education is a public service to be provided by the state under the governance of the Department of Public Education (*Secretaría de Educación Pública*). In 1992 compulsory education was extended from six to nine years, including three years of secondary education. Today, one-half of Mexican adults - 15 years and older are classified as being educationally disadvantaged as they lack a nine-year basic education.

22. Table 2 presents an overview of the educational attainment of those who have not completed the prescribed nine-year basic education by age, gender and the urban-rural divide.

Table 2. Educationally disadvantaged by age, gender and location, percentage

Age	Illiterate					No primary education				
	Men	Women	Urban	Rural	Total	Men	Women	Urban	Rural	Total
15 – 24	3.2	3.5	1.9	7.9	3.4	8.8	8.8	5.1	20.1	8.8
25 – 34	3.9	5.4	2.6	12.6	4.7	11.5	12.4	7.8	27.9	12.0
35 – 44	5.9	10.0	4.8	20.6	8.1	18.9	21.3	15.0	39.7	20.1
45 – 54	10.0	17.5	8.8	31.3	13.9	29.5	29.8	24.9	45.6	29.6
55 – 64	17.0	27.4	15.6	41.3	22.4	40.1	35.7	36.3	42.0	37.8
65 +	26.3	38.1	24.9	51.8	32.6	44.9	35.1	42.3	33.1	39.7
Total	7.4	11.3	6.1	20.7	9.5	18.8	18.5	14.9	31.1	18.6

Age	No secondary education					Total education disadvantage				
	Men	Women	Urban	Rural	Total	Men	Women	Urban	Rural	Total
15 – 24	22.7	23.6	18.5	37.6	23.2	34.7	35.9	25.5	65.6	35.4
25 – 34	23.4	24.5	21.8	32.0	24.0	15.4	42.3	32.2	72.5	40.7
35 – 44	25.0	27.5	27.1	23.3	26.3	49.8	58.8	46.9	83.6	54.5
45 – 54	25.7	27.1	30.2	13.6	26.4	65.2	74.4	63.9	90.6	69.9
55 – 64	22.0	21.8	27.1	7.6	21.9	79.1	84.9	78.9	90.9	82.1
65 +	16.1	16.6	21.3	4.3	16.4	87.3	89.8	88.4	89.2	88.7
Total	23.1	24.2	23.2	25.5	23.7	49.3	54.0	44.1	77.4	51.8

Source: XII Censo General de Población y Vivienda, 2000. INEGI.

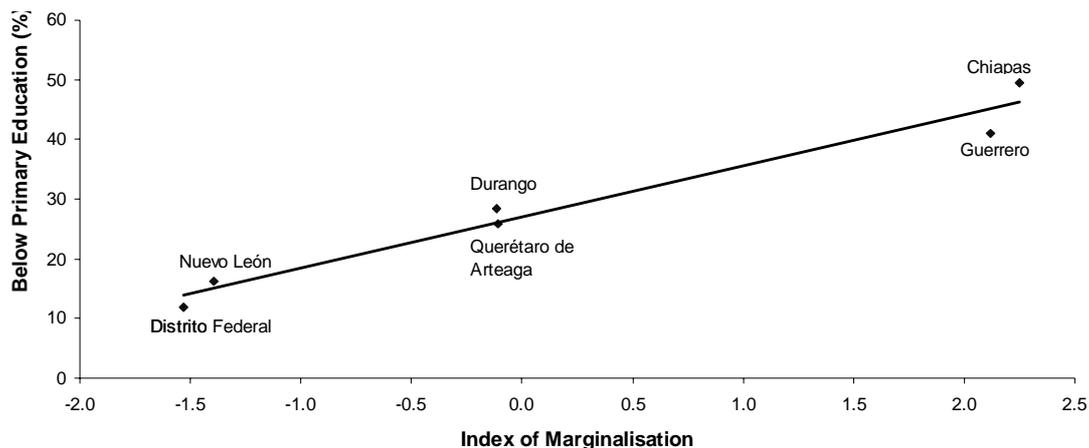
23. Four findings stand out in Table 2. First, the actual number of Mexicans that are classified as educationally disadvantaged is staggering. According to the 2000 census there are approximately 33 million people aged 15 and older (52 per cent of the population) who can be classified as educationally disadvantaged, using 9 years basic education as the criteria. Of these, six million are illiterate, 12 million are without a primary education and 15 million have not completed three years of secondary education. Noticeably, 50 per cent of the educationally disadvantaged are under 40 years of age. It is estimated that every year the Mexican school system produces 800,000 young people who join the ranks of the educationally disadvantaged. Despite major improvements in education at the primary level, demographic changes have meant that the actual number of people classified as disadvantaged has remained quite stable and is about the same for all cohorts below 50 years of age. As the level of education has improved, the severity of educational poverty in the adult population has decreased. Among the 15-19 years old, 2.9 per cent are illiterate and 7.7 per cent have not completed six years of education as compared to 7.4 and 17.9 per cent in the 35-39 years cohort.

24. Second, and rather surprisingly the proportion that did complete a primary education, but still lack three years of secondary education is more or less the same in all age groups -under 59 years. However, as the young population grows the actual number of people without a secondary education is

constantly increasing. Among the 15-19 year olds there are 2.1 million that lack three years of secondary education as compared to 1.1 million in the 35-39 year cohort. This reflects the limited effect of the 1992 reform and is an indication of the challenges involved in overcoming the educational deficit in Mexico. Thus, it is important to stress that while the proportion of the Mexican population that has not completed a primary education has decreased, there has been a sharp rise in exclusion rates for secondary education, particularly among children from economically deprived families. This is not only due to a lack of educational facilities but also to the fact that some families cannot afford to let their children attend school for nine years as the family depends on their labour for its existence (Bracho, 2002).

25. Third, despite noticeable improvements in all regions of Mexico, it is the urban population in particular that has enhanced its educational status, meaning urban-rural differences are gradually increasing. While 64.6 per cent of the rural population aged 15-19 years of age are educationally disadvantaged, for those living in the urban areas the figure is only 22.8 per cent. However, in absolute numbers, two thirds of the potential demand for basic education is made up of people living in urban areas. Illiteracy is widespread among the Indian population (25 per cent), and particularly among women (45 per cent). The urban-rural divide speaks to the link between poverty and degree of marginalization and educational exclusion. These relationships are portrayed in Figure 1.

Figure 1. Index of marginalisation and proportion of population lacking primary education for six states



Sources:

1. The participation data point to some serious barriers that need to be overcome in order to make the human capital strategy a reality.
2. Estimated by CONAPO based on the XII General C Directed of Planning, INEA. DGPP. SEP

26. In Chiapas, the state with the highest degree of marginalisation, approximately one-half of the population has less than six years of education as compared to 12 per cent in Distrito Federal.

27. Fourth, Mexico has made substantial improvements in the education of women and the gender differences have decreased. In the younger age cohorts there are only slightly higher proportions of women than men that are educationally disadvantaged. Slightly more than half of the educationally disadvantaged are in the labour force and of these only one per cent are officially unemployed. As mentioned above, this can be explained by the fact that the majority of those that are economically active

are employed in the informal economy. Of those that are not economically active, the vast majority, 66 per cent, are homemakers.

28. It is now 12 years since Mexico raised its compulsory educational requirement from six years to nine years of schooling. The review team wants to note that during the last decade the education required to get a job in the formal labour market has also continued to increase. OECD contends that a completed upper-secondary education is an essential bench-mark in industrialised countries as it has become a requirement for gaining access to the labour market and is an indication of the availability of skilled workers (OECD, 2003b). According to criteria established by the Economic Commission for Latin America and the Caribbean (ECLAC), the number of years of education required to provide a 90 per cent assurance that the population will not fall into poverty is 10 to 11 years for Latin American urban areas (Bracho, 2002 p.281). Furthermore, in Mexico an upper-secondary education is becoming a minimum requirement for entrance to the most dynamic sectors of the economy. In this context it is disturbing to note that in comparison to other countries with traditionally low educational attainment the proportion of the population that has attained at least upper secondary education has risen more slowly in Mexico than elsewhere, see Table 3.

Table 3. Per cent of population that have attained at least an upper-secondary education by age (2001)

		Age group				
		25-64	25-34	35-44	45-54	55-64
OECD Countries	Canada	82	89	85	81	67
	Korea	68	95	77	49	30
	Mexico	22	25	25	17	11
	Portugal	20	32	20	14	9
	Turkey	24	30	24	19	13
	United States	88	88	89	89	83
	OECD Mean	64	74	69	60	49
Non-OECD Countries	Argentina ¹	42	51	43	38	28
	Brazil ¹	26	31	29	23	14
	Chile ¹	46	58	48	40	27
	Indonesia	21	33	22	15	7
	Paraguay ¹	22	30	23	16	11
	Peru ¹	44	56	47	36	22
	Thailand ¹	18	27	18	10	6
	Uruguay ¹	31	37	34	29	21

Source: Education at a Glance 2003, Table A1.1. OECD (2003b).

Note: ¹ Year of reference 2000.

29. Of the selected countries Mexico is the only one where the percentage of the population that has attained at least upper secondary education is the same in the 25-34 year cohort as in the generation of 35-44 year olds. Further, Duryea and Pagés (2002) note that not only does average years of schooling for the adult population change very slowly but educational progress has also slowed in Mexico. For those born between 1955 and 1965, the length of education increased by 1.20 years during the decade. For those born

from 1965 to 1975, the increase over a decade slowed to 0.43 years of education. Mexico is not only facing the challenge of increasing the proportion of the school aged population who complete a basic education and/or who move on to upper-secondary or tertiary education, but it also needs to improve the quality of education. The results of the OECD PISA study that assesses reading literacy for 15 year-old students, reveals that 44 per cent of Mexican students have limited reading abilities (scoring at level 1 or below) (OECD 2003c), seriously limiting their ability to benefit from present educational opportunities. Moreover, as revealed by previous research, these students will likely not engage in any form of adult education later in life (OECD, 2000).

30. To address the Mexican educational deficit, the current government is introducing reforms that focus on expanding early childhood education and increasing the provision and quality of primary, secondary and tertiary education. It is the belief among the Mexican policy makers we meet that the social and economic ambitions of Mexico cannot be realised as long as the number of educationally disadvantaged school leavers remain at the present level.

31. It is not enough, however, to expand and improve secondary and tertiary education for coming generations. These reforms must be accompanied by the development of an adult education and training sector that will not only provide continuous upgrading of the labour force, but will also respond to the long history of private and public under-investment in education.

3. OVERVIEW OF ADULT LEARNING

32. Our overall observation is that there exists a serious under-investment in adult education and training in Mexico. Based on our estimations, using the provided data¹, 9.3 per cent of the Mexican adult population 15 years of age and older participated in some form of adult education and training in 2001. This is substantially lower than participation rates in some other countries, with similar education profiles and for which comparable statistics is available, such as Chile, Poland and Portugal which are closer to 20 per cent (OECD, 2000). Participation rates in highly industrialised countries vary from the high 30 percentage range to the low 50 percentage range (OECD, 2000). Further, roughly 6.8 per cent of the Mexican workforce received some form of training at the workplace. From an international perspective, this is a very low figure and speaks of the lack of a training culture in the Mexican labour market.

33. The reviewers want to stress that the outcomes of present policy initiatives on adult education and training must be seen in the context of the Mexican economy and the poverty situation addressed above as well as the general limitations to the present policy capacity to be discussed below (see section 3.1.2).

34. Based on the statistical information provided in the *Background report* and additional information that has been gathered, we want to raise three issues about the present pattern in recruitment to adult education:

¹ Sources:

Datos Cebas, Cedex, Secundaria para trabajadores y Capacitación para el Trabajo. DGPPP-SEP

Datos CIMO y PROBECAT. Subsecretaría de Capacitación y Productividad. STPS

Datos INEA, SASA

Datos capacitación en empresas. Estadísticas en materia de capacitación y adiestramiento. STPS

- a shift from basic adult education to job related training
- job related training and the educationally disadvantaged
- regional imbalances in basic adult education

3.1 A shift from basic adult education to job related training

35. The Reviewers want to draw attention to the major shift that occurred in the participation pattern in adult education and training during the period 1995-2001, see Table 4.

Table 4. Participation by provider and/or forms of adult education and training 1995-2001, per cent.

Education/		Year						
Training		1995	1996	1997	1998	1999	2000	2001
Basic Education	INEA	52	42	32	31	27	17	18
	CBAS	3	3	3	3	4	5	6
	Secondary for workers	2	1	1	1	1	1	1
Work related training	Training for work	10	26	30	31	35	38	32
	Non-formalwork-related training	2	2	2	3	2	2	2
	Training inthe workplace	32	26	32	31	32	37	38
Total		100	100	100	100	100	100	100
N		4,209,204	4,809,801	5,589,736	6,276,864	6,660,964	6,312,352	5,656,464

Sources:

Datos Cebas, Cedex, Secundaria para trabajadores y Capacitación para el Trabajo. DGPPP-SEP

Datos CIMO y PROBECAT. Subsecretaria de Capacitación y Productividad. STPS

Datos INEA, SASA

Datos capacitación en empresas. Estadísticas en materia de capacitación y adiestramiento. STPS

36. There has been a dramatic change in the balance between basic adult education and job related training. In 1995, participants in basic education constituted 57 per cent of all participants in adult education in training. By 2001 this figure had dropped to 25 per cent, with three of every four individuals participating in some form of job training, rather than basic adult education and training. This development resulted from a sharp decline in the number of students being served by INEA and a sharp increase in various government training programmes primarily aimed at the unemployed population. During this period the number of students in INEA courses and programmes was reduced by one-half. The most dramatic decline happened between 1999 and 2000 when the number of students decreased by 38 per cent. The shift in the composition of adult education and training and the decline in the number of students served by INEA severely decreased the capacity to address educational poverty in the country and raises issues about the consequences for the government's poverty reduction strategy. We are particularly

concerned with the capacity of work related adult education and training to address the needs of the educationally disadvantaged.

3.2 Job related training and the educationally disadvantaged

37. With the exception of the training programmes targeted at unemployed workers, PROBECAT, the precursor to SICAT, there is a lack of in-depth evaluation, which makes it difficult to draw any conclusions about positive and/or negative consequences of the change in participation behaviour. However, our impressions, as well as available data, suggest that Mexico faces the same dilemma as other countries (Duryea and Pagés, 2002; OECD, 2000). That is, educationally disadvantaged groups are severely underrepresented in work related adult education and training.

38. Table 5 presents participation rates among 25-64 year olds in all forms of job related training including that organised by firms as well as publicly funded job related training.

Table 5. Participation rates in job related training for 25-64 years of age by educational attainment

Educational attainment	Percent participation
Pre-primary	0.5
Primary	2.5
Lower secondary	6.8
Secondary	13.9
Tertiary	30.7
Total	7.7

Sources:

1. National Survey about education, training and employment 2001, INEGI.
2. Automated Monitoring and Accreditations System (*Sistema Automatizado de Seguimiento*), INEA
3. General Planning, Programming and Budget Management Unit (*Dirección General de Planeación, Programación y Presupuesto*), SEP
4. National survey about employment, 2001, INEGI

39. The figures in Table 5 provide reasons for being concerned about the changing pattern of participation. Only 0.5 percent of the 25-64 years old who lack a primary education and 2.5 percent of those with a primary education received some form of job related training in 2001. Among those with a university education the figure was 30.7 per cent. At the same time 3.7 percent of those without a primary education and 2.5 percent of those with a primary education were enrolled in basic education. Thus, publicly sponsored job training does not seem to reach those with severe educational poverty, who, for their further education, have to rely on basic adult education.

40. A further reason to be concerned is that job training is usually of short duration. This is particularly true for employer sponsored activities. However, SICAT programmes that come in different modalities, school based or on-the-job training, are relatively short, 2-3 months. Consequently even when the programmes reach unskilled workers they have limited capacity to improve their general skills. It is therefore of interest that there is evidence to suggest that returns to job training programmes for the educational poor is lower than the return to formal adult education (Duryea and Pagés, 2002). In order for the educational poor to benefit from more advanced labour market training programmes they need to possess the basic skills.

3.3 Regional imbalances in basic adult education

41. Only a very small proportion (4.3 per cent), of the educationally disadvantaged are presently being reached by basic adult education and training, see Table 6.

Table 6. Recruitment of target groups to basic adult education 2001 by states and provider, percentages

State/ region	Degree of marginalization	Participation in Literacy Programmes			Participation in Primary Programmes			Participation in Secondary Programmes			
		INEA	CBAS	Total	INEA	CBAS	Total	INEA	CBAS	Secondary for workers	Total
Chiapas	Very high	6.8	0.1	6.9	3.0	0.3	3.3	4.0	0.3	0.3	4.5
Guerrero	Very high	6.0	0.0	6.0	3.6	0.4	2.8	2.6	0.3	0.1	3.0
Oaxaca	Very high	3.6	0.1	3.7	4.2	0.3	4.5	3.1	0.4	0.3	3.8
Veracruz - Llave	Very high	8.1	0.1	8.1	3.7	0.1	3.8	3.4	0.1	0.7	4.1
Hidalgo	Very high	3.8	0.1	3.9	2.9	0.1	3.1	3.1	0.2	0.1	3.4
San Luis Potosí	High	9.9	0.3	10.2	2.1	0.3	2.5	4.4	0.0	0.3	4.7
Puebla	High	3.3	0.1	3.4	4.4	0.3	4.8	2.4	0.1	0.2	2.8
Campeche	High	20.5	0.1	20.5	11.2	0.6	11.8	8.8	0.9	0.4	10.1
Tabasco	High	21.4	12.2	33.6	2.8	5.0	7.8	3.3	6.8	0.3	10.5
Michoacán de Ocampo	High	2.0	0.0	2.0	1.4	0.4	1.9	2.2	0.9	0.5	3.6
Yucatán	High	5.3	0.0	5.3	2.8	0.4	3.3	2.8	0.6	1.8	5.3
Zacatecas	High	4.6	0.1	4.7	0.9	0.1	1.1	3.5	0.2	0.0	3.8
Guanajuato	High	2.1	0.0	2.1	1.6	0.1	1.7	2.8	0.0	0.0	2.8
Nayarit	High	2.1	0.1	2.2	2.5	0.3	2.8	3.0	0.8	0.5	4.3
Sinaloa	Medium	15.0	0.2	15.2	1.1	0.4	1.5	3.8	1.1	0.0	4.9
Querétaro de Arteaga	Medium	5.0	0.1	5.1	4.2	0.1	4.3	4.1	0.1	0.1	4.3
Durango	Medium	2.7	0.0	2.8	3.2	0.3	3.5	4.5	0.5	0.0	5.1
Tlaxcala	Medium	3.7	2.7	6.5	3.5	6.8	10.2	3.2	6.0	0.0	9.3
Morelos	Medium	2.3	0.1	2.4	3.2	0.5	3.7	3.6	0.2	0.1	3.9
Quintana Roo	Medium	10.0	0.2	10.2	7.7	0.4	8.1	6.4	0.4	0.5	7.3
México	Medium	1.2	2.4	3.6	0.9	1.5	2.5	1.3	2.2	0.1	3.6
Colima	Medium	2.1	0.8	2.9	2.4	1.1	3.6	3.7	2.2	1.0	6.9
Tamaulipas	Medium	13.4	7.2	20.6	2.6	1.9	4.5	3.3	3.7	0.4	7.3
Sonora	Medium	1.1	0.0	1.1	3.2	0.0	3.2	3.5	0.0	0.2	3.7
Jalisco	Medium	0.6	0.1	0.6	1.2	0.2	1.4	2.5	0.7	0.1	3.3
Chihuahua	Medium	4.9	0.0	4.9	2.0	0.3	2.3	4.2	1.3	0.0	5.5
Baja California Sur	Medium	2.5	0.4	2.9	3.7	0.4	4.1	5.1	0.3	0.1	5.5
Agascalientes	Medium	28.7	3.7	32.5	1.8	2.1	3.9	3.2	2.8	0.0	6.0
Coahuila de Zaragoza	Very low	1.1	1.2	2.3	3.5	6.3	9.8	3.4	5.3	0.4	9.0
Baja California	Very low	4.0	0.1	4.1	1.8	0.2	2.0	3.7	0.0	0.3	4.1
Nuevo León	Very low	0.7	0.5	1.2	1.4	3.3	4.8	1.6	3.8	0.9	6.3
Distrito Federal	Very low	1.6	1.2	2.7	2.1	0.4	2.5	2.9	0.3	0.8	4.1
National		5.1	0.7	0.1	2.5	0.8	3.3	2.9	1.2	0.3	4.5

Sources:

1. The participation data point to some serious barriers that need to be overcome in order to make the human capital strategy a reality.
2. Estimated by CONAPO based on the XII General C Directed of Planning, INEA. DGPP. SEP

42. Existing data suggest that there are large regional differences in the extent that the educationally disadvantaged are recruited to basic education in 2001, see Table 6. Three findings are of particular interest. First, the variations between states in regard to literacy programmes are particularly large. The participation by illiterates in these programmes varies from 0.6 per cent in Jalisco, to 33.6 per cent in Tabasco, while the rates for primary education vary from 1.1 per cent in Zacatecas, to 11.8 per cent in Campeche. The variation is reduced for secondary education from 2.8 per cent in Puebla and Guanajuato, to 10.5 per cent in Tabasco. This state stands out because of its very high relative participation rates in all forms of basic education. It also seems to be well served by both INEA and CBAS.

43. Second, and based on a review of participation rates over 6 years, trend data indicates that participation rates can vary considerably between years. Looking at the figures for INEA, the main provider of literacy programmes, it becomes evident that the states that have particularly high rates in 2001 (with the exception of Tabasco), show only a high to moderate level of participation in 2002. Interestingly, there is only one state, Guanajuato, where during the period 1995 to 2001, the rates in INEA literacy programmes increased from 2.1 per cent to 5.4 per cent. Participation rates appear to vary more in courses and programmes organised by INEA than by CBAS.

44. Third, there does not seem to be any clear relationship between an individual state's degree of marginalisation, and the extent to which the target population in that particular state is recruited. For example, literacy programmes are prominent in states with high and medium degrees of marginalisation, while other states with a similar level of deprivation report very low participation rates. It is worth noting, however, that in general illiterates living in states with a low degree of marginalization are badly served. One exception to this trend is Mexico where those living in the most deprived areas are somewhat better served, with rates in the 4 to 8 percentage range.

45. The Reviewers find the large state variations in success in recruiting the educationally disadvantaged somewhat disturbing while at the same time highly intriguing. It would be of great interest to look at best practices in the more successful states. Similarly it will be important to get a better understanding of why the participation levels tend to vary substantially from year to year.

46. In order to estimate how well the different target groups are being served the number of participants in literacy programmes were divided by the total number of illiterates, the number of participants in primary education by the number lacking this level of education and, the number of people taking secondary education by the number lacking three years of secondary education. It is of interest to note that those experiencing the most severe form of educational poverty, being illiterate, are reached to a somewhat greater extent (5.9 per cent) than those lacking a primary education (3.3 per cent), or three years of secondary education (4.5 per cent). However, the trend is towards a stronger emphasis on those lacking a secondary education and there are fewer courses for illiterates and those lacking a primary education. In 1995, 40 per cent of the courses offered by INEA were for illiterates, 36 per cent were targeted to those without a primary education, and 24 per cent of the courses were at the secondary level. By 2001 these figures had changed dramatically and were 29 per cent for illiterates and 28 per cent for those lacking a primary education, and 43 per cent for those with three years of secondary education, respectively. The changes were less marked for the other main providers of basic education, CBAS, but they were in the same direction with more courses offered at the secondary level. Thus, while literacy programmes are reaching a higher proportion of illiterates, there is a marked change in the recruitment of those lacking a secondary education. This is a rapidly expanding group, but the change in participation rates is substantially larger than what would have been expected from the demographic changes that took place

between 1995 and 2001. The Reviewers want to draw attention to the fact that these changes occurred during a period when there was a drastic decrease in the number of people being recruited by INEA to adult basic education.

47. The recruitment data in basic adult education are in line with the government's decision to particularly focus on those poverty groups that have managed to rise above extreme poverty. From a lifecycle perspective it makes some sense to give particularly attention to the younger generation of educationally disadvantaged who, lacking appropriate qualifications, find it increasingly difficult to compete in the formal labour market. However, there is also a fundamental issue of equality. Policies based on Amartya Sen's concept of basic capability equality will have to take into account differences in those abilities that are crucial for citizens to function in society (Sen, 1982). Dealing with recruitment to adult education and training it is wise to remember the fundamental problem caused by the fact that people living under difficult conditions tend to come to accept their fate as they do not imagine any reasonable alternative (Nussbaum, 1990).

4 MAIN THEMES

4.1 Purpose and priorities for adult learning

4.1.1 Policy direction

48. Based on our meetings with federal and state representatives and review of recent policy documents it is our impression that there is a beginning understanding in the Mexican policy community of the importance of adult learning and the need to start to substantially improve the capacity to address this complex issue.

49. The National Development Programme for 2001-2006 (*Plan Nacional de Desarrollo*) proclaims the right of all citizens to an education and training and the necessity to guarantee that education is made accessible to every child, adolescent and adult. This would involve addressing the unacceptable large regional differences in the country and advancing the process of decentralisation that was initiated in the 1992 federal reform of education. Adult education and training is closely linked to the government's efforts to promote economic growth and combat poverty. A crucial element in this strategy is the development of a new working culture (*desarrollar una cultura que promueva el trabajo*) that is expected to generate better jobs, an increased standard of living and provide new opportunities for personal fulfilment. To make this a reality, the Programme proposes increased possibilities for technical training of workers targeted to the rural population, small-business owners and the self-employed. The training issues are specified in the National Labour Policy Programme in the Department of Labour and Social Security (*Secretaría del Trabajo y Previsión Social, STPS*). This Programme proposes a fellowship scheme to help prepare people for technological changes and also to promote increased productivity in small and medium-size companies by means of training. The needs of the farmers are being addressed through agricultural extension initiatives.

50. Aware of the problems resulting from an overly centralised system, the government has expressed a commitment to undertake the reforms necessary to realise a well developed and decentralized education system. Such a system would consist of high quality institutions that can offer satisfying conditions to all students regardless of where they live and provide them with access to well trained

teachers. To assist the large group of adults, who in their youth were not able to finish basic education, the Programme calls for increased attention to basic adult education.

51. The general direction of the National Programme is elaborated in The National Education Programme, 2001-2006, and it recognises that there has been a lack of focus on adult education, particularly within marginalized groups (the elderly, indigenous people, migrants, unskilled workers). Two main problems are highlighted. First these groups often lack necessary services. Second, when it is available, the type of instruction is not suitable for students who are not accustomed to the habit of self-learning. In order to better serve local needs, the Programme encourages the main providers, INEA, CAPFCE and CONALEP, to further decentralise their operations. The Educational Programme notes that improvement of educational quality is hard to achieve without additional resources that would lessen the dependence on volunteer instructors lacking adequate preparation.

52. To better serve the large groups of educationally disadvantaged in Mexico and to address inadequate teaching methods, the Educational Programme presents a new principle, education for work and life (*Educación para la Vida y el Trabajo*, MEVyT). This strategy emphasizes that what is needed is more practical forms of education with connections to work and the lives of the participants.

53. Connecting to the two broad discussions of lifelong learning and skills standards, the document ascribes to the shift from teaching and education, to learning. In line with this, new initiatives to design a flexible and reliable process for recognising and certifying knowledge and skills acquired outside of the formal educational system are being promoted. Recognising the limitations of the formal educational system to respond to the current challenges, alternative structures of a network type are being promoted to integrate governmental and non-governmental organisations.

54. In order to facilitate the co-ordination and increased awareness of the centrality of adult education and training, the National Council of Education for Life and Work (CONEVyT) was created in 2002. The organisation is regarded as a key instrument in the federal government's dual strategy of poverty reduction and economic growth. It was given the responsibility for building a national system of education for work and life and for articulating the role of the different providers. It is also responsible for programme evaluation and research. For the current period, 2001-2006, CONEVyT has identified three primary objectives: (1) the integration of the national system of adult education and training; (2) the development of new approaches to address the problems of the educationally disadvantaged; and (3) to find ways to improve the quality of life and the equality of the Mexican people. To achieve this objective, three target groups are identified: young adults just coming into the labour market; the Indian population, and workers in need of continuous training and those already working who are in need of an accreditation of their professional competencies.

55. CONEVYT is to develop strategies for an extensive use of information technology and telecommunications within the overall goal of reducing inequalities, particularly in remote regions with low population density. Another central initiative under CONEVYT is the creation of Plaza Comunitarias, a community initiative offering computer skills, literacy classes and other forms of basic education, crafts and some work oriented programmes in new and innovative ways.

56. Before looking more closely at the present purposes and policy directions the Reviewers want to note that the capacity of the Mexican government to act on matters related to adult education and training and realise their ambitious policy agenda is restricted by several factors that fall into two broad categories: general limitations of the Mexican state and limitations more directly linked to the policy strategy in adult education and training.

4.1.2 General limitations in policy capacity

57. The Reviewers want to draw attention to three broad factors that affect the government's capacity to realise the goals laid out in *Plan Nacional de Desarrollo*:

- limited tax revenues;
- lack of penetration of the new working culture; and
- the conditions under which a human capital strategy can enhance the economy

58. The possibility to raise necessary public funding for the ambitious reform programme is severely restricted by a tax/GDP ratio, which, at 18.5 per cent, is the lowest in the OECD and one of the lowest in Latin America.

59. As discussed above, the new working culture, which is supposed to motivate employers and employees to substantially increase their human capital investment, is being presented as a crucial condition for economic revival and poverty reduction. The Reviewers want to highlight several challenges to realising this goal. First, the concept as presented in official documents is quite vague and is more an expression of the understanding that major reforms need to take place within working life as well as in the individual citizens' relationship to work than a well defined strategy for action.

60. Second, a new working culture is dependent on a climate where the social contract is being enforced through labour policies and regulations. Judging by the enforcement capabilities of the Mexican Ministry of Labour this is a serious deterrent to the development of a new working culture. In 2000 the number of fines imposed for non-compliance with some aspect of labour regulations per 100,000 workers in Mexico was 0.29 which should be compared to 1.31 in Brazil (Inter-American Development Bank, 2003, p. 277). During our visits to various companies, we were able to directly observe the non-compliance with the labour regulations. As an example, we noticed that the firms did not seem to fulfil their obligation to hire disabled workers. When confronted with the question all we got was a series of weak excuses like wheelchairs are inappropriate in the factory. We also learned about systematic discrimination against married women and older workers.

61. Third, during our visit it became evident that with the exception of senior bureaucrats at the federal level and top leadership within the unions, neither employers nor union members, state officials or educators have a clear understanding of what is implied by the new working culture. So far the concept has failed to take root outside a narrow circle of top policy makers.

62. The National Programme reflects a strong belief in a human capital strategy to combat poverty and enhance productivity. This is in accordance with the current understanding in the economic literature and the fact that countries with high labour productivity are most likely rich societies (Duryea and Pagés, 2002, p. 5). However, it is important to note that there are limitations on what an expansion of education in of itself can contribute to economic growth (Heckman, Krueger and Friedman, 2004). First, as Duryea and Pagés (op. cite.) point out, while there is solid evidence to suggest that more education is associated with higher labour income education, it only has a limited capacity to increase wages in the short term. As the starting level is very low, a small increase in wages through more education still leaves a large population under or just above the poverty level.

63. Second, the basic assumption in a human capital strategy is that the introduction of technology generates demand for increased skills, which in turn, promotes technological change and ultimately results in productivity gains. Thus, if technology becomes stagnant, that partly is the case in Mexico, this

incentive is reduced and may disappear (Welch, 1970, p.41). Consequently it is not enough to improve the skills of the workforce; the skills must be useful for the production, which is dependent on the institutional environment. A human capital strategy is thus dependent on a parallel improvement of the institutional and economic environment. This further underlines the crucial importance of creating conditions for the new working culture and modernisation of the agricultural sector.

4.1.3 *Emphasis on adult education: rhetoric or reality*

64. It is well known that policy makers' bald declarations on the importance of adult learning used to be mostly rhetoric. It is therefore of particular interest to explore if the recent interest in adult learning in Mexican policy circles is matched by a reallocation of resources in favour of this sector. The possibility of recruiting more people, particularly the educational poor, into adult education and training depends to a large extent on what resources are being made available.

65. As discussed above, the National Development Programme for 2001-2006 and the Educational Programme both stress the importance of improving adult education and training capacity in Mexico. This was also the message we heard during our visits with representatives from different levels of government. To achieve these goals, and to reflect the emphasis that the present government gives to education, public expenditure on education is set to increase substantially, rising from 3.2 per cent of GDP in 2000 to 8 per cent in 2006. At this point in time it is uncertain if the government will be able to achieve, or even come close to this ambitious goal, as the share of GDP committed to education did not increase during the first two years of the planning cycle.

66. The National Development Programme does not indicate how an increase in spending will be distributed across sectors and what share should be allocated to adult education and training, nor does it consider the appropriateness of the current division of resources. The Reviewers want to raise this as an issue of concern as presently only a very small share of the total educational expenditures (3.57 per cent in 2002) goes to adult education and training. Furthermore, the share of educational expenditures that is allocated to the adult education sector has not increased but instead has seen a slight decrease since 1998, see Table 7.

Table 7. Public investment in adult education as a percentage of GDP and percentage of total public expenditure on education, 1997-2002

Year	% of GDP	% of total expenditure on education
1997	0.15	3.2
1998	0.20	4.0
1999	0.19	3.8
2000	0.20	4.0
2001	0.20	3.7
2002	0.19	3.5

Source: Basic statistics of the National Technological Education System 1997 – 2002. SEIT

Note: The 2002 data are preliminary and partial

67. During our visits we heard criticism that the government's talk about the importance of adult education and training tends more towards rhetoric than reality. Judging from the share of public expenditures on education devoted to adult education there seems to be some substance to this criticism.

68. The imbalance in spending between adult education and other forms of education is also reflected in spending per student in different forms of education. As noted in *Education at a Glance 2003* (OECD, 2003b), education spending per student is similar throughout the OECD and rises sharply from primary to tertiary education. Relative to other OECD countries this rise is particularly noticeable in Mexico. Table 5 presents not only the expenditure per student in the formal system, but also provides information on expenditure per student in adult basic education and job training. Expenditure per student in primary education is used as a criterion.

Table 8. Educational expenditure per student by level of education, 1997-2002

Expenditure on primary education=1

Year	Pre-Primary	Primary	Lower-Sec.	Upper-Sec	Tertiary	Adult Basic ¹	Job Training ²
1997	1.12	1	1.62	3.75	5.48	0.24	0.99
1998	1.04	1	1.59	3.25	5.25	0.26	1.05
1999	1.10	1	1.53	3.04	4.62	0.27	1.05
2000	1.09	1	1.53	3.11	4.93	0.34	1.09
2001	1.09	1	1.52	3.34	4.90	0.30	1.23
2002	1.10	1	1.53	3.27	4.98	0.31	1.23

Sources:

1. National Educational System DGPPP-SEP

2. Basic education, INEA

3. Job training. Basic statistics of the Technological Education System. SEIT

Notes:

1. This information is for the INEA.

2. The data are worked out based on the average unitary costs of the Job Training Centres (Centros de Formación para el Trabajo, CECATI) and the State Training Institutes (Institutos de Capacitación estatal, ICATE)

69. Two findings stand out in Table 8. First, the expenditure per student in adult basic education is very low compared to that at various levels of the formal system. Despite a moderate relative increase in the expenditure per student in basic adult education in recent years, it still only amounts to one third of what is spent per student in the formal system of education. Second, expenditure per student in job training is similar to what is being spent in primary education and has risen in relationship to the latter from .97 in 1997 to 1.23 in 2002. However, it is still less than expenditure per student in lower secondary education.

70. The National Development Programme notes the government's continuing commitment to decentralise adult education and training and to increase the role of the States and local authorities and the private sector. The figures on public expenditures on adult education and training partly reveal that such a process has been ongoing since the late 1990s. In 1997, for example, as much as 99.9 per cent of all public funds for adult education and training came from the federal government. In 1998 this figure dropped to 91.4 per cent and was further reduced in 2002 to 88.7 per cent. The remaining 11.3 per cent was extracted from the federal state level. Unfortunately the review team lacks data on the balance between federal and state support for adult education and training in the individual states or the proportion of federal funds that are allocated to each state. Thus, we are unable to assess to which extent the present policy direction will further regional inequalities. However, judging from the information we received at our visits in Aguascalientes and Chiapas, there is an apparent danger that this will be the outcome. The poor states lack the resources necessary to promote adult education and training which make them become totally

dependent on the federal government. The funds for adult education and training contributed from the local municipal governments still remain negligible.

4.2 Making learning more attractive and accessible to adults

71. During our visit, we heard repeatedly that illiteracy is often linked to a feeling of shame and self denial. More importantly, many individuals living in severe poverty do not see participation in any form of basic education as something that will lead to improved living conditions. This creates fundamental problems that are caused by the fact that people living under difficult conditions tend to accept their fate, as they do not imagine any reasonable alternative (Nussbaum, 1990). Nussbaum argues that instead of accepting this situation, it is the duty of the state, with due respect to the citizen's right to choose different ways of life, to see to it that citizens are in a position to make well-considered choices.

72. In section 3 we could observe that participation in adult education and training is at a disturbingly low level in Mexico and that only a very small segment of the educationally disadvantaged are being reached by organised learning initiatives. Based on our observations we will draw attention to some particular pertinent issues and point to factors that need to be addressed. The following aspects will be addressed:

- a relevant curricula
- promoting learning communities
- skills strategy
- integration of learning and rural development
- regulatory inflexibilities
- role of non government organisations
- problems in serving the indigenous populations

4.2.1 A relevant curricula

73. It is a common understanding in adult education that a necessary condition to more successfully attract underprivileged groups to adult education is to be able to offer a curriculum that they find relevant and stimulating. We were therefore very encouraged by the recent curricula reforms in adult basic education that breaks with the old scholastic tradition that has been prevalent in Mexico. Under the leadership of INEA Mexico has developed a new and improved approach to engage the educationally disadvantaged. The model named Education for Life and Work (*Modelo Educación para la Vida y el Trabajo*, MEVyT) offers educational options linked to needs, interests and expectations of underprivileged groups. The studies are oriented to develop abilities to improve their personal, family, work and community conditions.

74. For certification purposes MEVyT is being divided into three levels: initial, middle and advanced. These correspond to what traditionally used to be labelled basic literacy, primary education and secondary education. The content is organised into modules that provide increased flexibility. Within the three levels, the models are organised into three content categories: basic, diversified and alternatives. The first consists of themes that are grouped around three axes: language and communication, mathematics and science. The second category is directed to develop knowledge and competencies around key social roles.

So for example in the module *To Produce and Conserve the Field* the student develops or strengthens reading, writing and mathematic abilities while at the same time practicing different technical procedures to improve the farming production and to conserve the environment. The third category, alternatives, provides options that can be used to replace the basic modules.

75. During our visits we could sense how the curricula reform had invigorated the whole field of adult basic education. There was a strong enthusiasm around the program and a clear sense of direction. It was seen as particularly important that the new curricula begin to recognise that education for work is a legitimate area of basic adult education.

76. From what we heard, the challenge for Mexico today is to improve the capacity to continuously produce and distribute appropriate new learning materials reflecting the MEVyT philosophy. We also heard that despite a major investment in training the staff in the new approach, some of the volunteers still are not fully immersed in MEVyT. This seems to be an increasing problem caused by funding restrictions. As INEA increasingly move to offer programs in cooperation with other agencies a further challenge is to encourage the many of its partners to accept the MEVyT model, and to integrate it into their practices.

4.2.2 Promoting learning communities

77. During the last couple of years, Mexico has begun to develop a unique and highly intriguing form of community learning, Plaza Comunitarias, which provides a physical presence in the community of broad based learning around which various organisations can come together. Plaza Comunitarias has the potential to become an important vehicle for the creation of social capital through building networks and social relations. This was apparent during our visit to Plaza Comunitarias in Tuxla and Aguascalientes. There was a strong sense of community and an innovative spirit focused on combating poverty and exclusion. The structure not only promotes personal development and acquisition of skills, but also has the potential to become an important vehicle for the creation of social capital through building networks and social relations. When every Plaza Comunitarias can offer internet activity they will also be an important contributor to electronic democracy.

Box 1 Plaza Comunitarias

Plaza Comunitarias project

The Community Plazas are educational facilities that are open to the community and form a part of the e-Mexico project. They are places where educationally disadvantaged youth and adults have access to basic education and work training opportunities, with the combined and integrated use of three learning environments: a regular classroom, an educational TV and video salon and a computer and internet salon.

How is a Plaza Comunitarias created?

The Instituto Estatal (State Institute) la Plaza contracts with and trains two operational personnel: a technical support person and a promoter.

The State Institute operates the educational services offered in the Plaza in accordance with the curricular norms, and in coordination with other user-organisations.

How does a Plaza Comunitarias operate?

The Plaza is promoted to different segments of the population, though preference is given to the population served by the INEA, those who are new learners and large groups.

The three main learning spaces can be used flexibly and the schedule is set according to the needs of the users.

Technical Resources

A server (with CD reader/burner), 10 networked computers and a printer.

A television, a video reader, and in some cases an EDUSAT antenna.

Material on video, CD, and books.

An educational portal www.conevyt.org.mx

Microsoft Office and software for editing audio and video.

Each Plaza user will have an email account in the CONEVyT domain, and access to discussion forums.

The spread of Plaza Comunitarias

Some 1100 Plazas had been established by the end of 2003, and another 125 were ready to open. In 2001 there were 140 Plazas, and in 2002 there were 873. Cooperation agreements had been signed with other institutions in more than 700 CCD's.

By the end of May, the SCT will have installed connectivity service for 767 Plazas.

Each Plaza will have remote administration and security systems.

The majority of the Plazas are only in the initial stages of operation.

78. Although we were impressed with the Plaza Comunitarias, we also came away with the feeling that they were often very under resourced and that the adults who come out of them would not be well equipped for jobs in the modern economy. Some of the Plaza Comunitarias - particularly in the capital - had excellent facilities, while some of the rural facilities – especially those in indigenous education - were of a very low standard with limited availability of resources or ability to update computer software and renew books and other learning materials. New and improved textbooks are being produced but the problem is to find the resources to supply all classes with these new materials. There is a fundamental incompatibility between the Mexican policy of encouraging entrepreneurship and technological advancement and an under resourced adult education.

79. We were struck by the lack of mature adults in the Plaza Comunitarias we visited. The Plaza currently attracts young people, aged 15 to 18 years, and few people over age 25 seem attracted by them. Thus, an urgent problem that needs to be addressed is how to convince those individuals 25 and older to participate in the Plaza's activities.

80. We also learned of the problems involved in applying for federal resources through INEA, not only for basic education but particularly for job training programmes that would help in the recruitment of the poor. The local representatives emphasised that although the MEVYt is a promising initiative, INEA needs to develop a more systematic concept of education for work. This is according to the field a major political problem that only can be solved by INEA. The staffs' position was reiterated in our discussions with some of the women attending a job training program. They were very keen to learn but only if it lead to skills they could use to earn a living. This raises issues on how the Plaza Comunitarias can best establish a set of programmes that could respond to the needs of the target group.

4.2.3 Skills strategy

81. In spite of a variety of policy initiatives to enhance the skills of the Mexican workforce the data presented in section 3.2 reveal that the level of training is still far too low. In this section we want to draw attention to the need to address the wide spread variation in the use of skills standard and certification systems across the country and the urgency to enforce the training accord of the federal labour law.

82. In 1995 the Labour Ministry embarked on an ambitious project, CONOCER, to create a modern system of national standards and certification following the NVQ system in the UK. Today CONOCER operates a highly sophisticated programme with 600 national standards, of which 80 per cent are in use.

Box 2: CONOCER

CONOCER, the Occupational Competency Standardisation and Certification Council, established in 1995, is under the auspices of the Ministry of labour and operates as a public trust. The CONOCER system focuses on four main tasks:

- The establishment of technical occupational competency standards by branch of activity or occupational group. This is being implemented by the social partners with government support.
- The development of mechanisms for evaluation, verification and certification of knowledge, abilities and skills of individuals, regardless of how they have been acquired.
- The creation of a training system consisting of flexible modules based on competency standards.
- The promotion of the new system to individuals and firms in ways that promote a more equitable distribution of training and certification opportunities while addressing the needs of disadvantaged groups.

The Council is composed of six representatives from the management sector, six from the social sector, five representing the workers, one from the agricultural sector and six from the public sector. There are currently some 60 Labour Competency Standardisation Committees operating. These committees are made up of management and workers representing a specific work activity e.g. footwear manufacturing. In addition there are approximately 30 evaluation agencies – 15 of which are private – that can provide certification based on these national standards.

Source: ILO/CINTERFOR

83. The CONOCER system is highly sophisticated. However, it has proved to be difficult to get national acceptance for the CONOCER model. In fact, during our visits we became acutely aware that parallel to the CONOCER arrangement there exists a system of certification at the state level and yet another layer of certification at the community level. These two grades of certification are different from the one based on the CONOCER model, and do not provide certification of national standards. Their advantage is that the standards used seem to be easily developed, they are readily accessible and perhaps more importantly, cost much less than the national certification. Judging from the information we received during our visits with local companies, representatives from state institutions and local providers, these state and/or local certificates were accepted in the local labour market and did not constitute any form of handicap for those workers who possessed them. What is less clear from the information we were able to gather, is how useful these credentials would be in the event that an individual moved to another area. The fact that these community or state level credentials appear to be readily accepted is an indication that the notion of national standard is not yet a universal concept in Mexico. This will not happen unless there is more uniformity in the practice of certification across Mexico.

84. The Mexican Labour Law, *Ley Federal del Trabajo*, is very specific in regards to training arrangements. According to *Article 152-A* every worker has the right to receive training and the companies are legally obliged to develop their own training programmes or to provide it through some external body. The law specifies that external training can only be offered by registered training institutions. The company must produce a training plan that should be registered with a federal training bureau *Comisiones Mixtas de Capacitación*. However, according to the information we managed to gather, less than 50 percent of existing companies have registered such a training plan. The problem is made worse by the fact that those companies that indeed have a training strategy are primarily oriented to the training of management and the unskilled receive little, if any, systematic training. This practice was confirmed at our visits to some of the exemplary companies well known for their progressive training policies. In order to stimulate the investment in skills more broadly the government must seriously address the gap between the spirit of the training accord and how it is being practiced. This is an area where new forms of cooperation between the social partners in competency accords might be very beneficial to the human capital effort of

the government, and ultimately to the Mexican economy. 4.2.4 Integration of learning and rural development

85. Severe poverty and persistent inequality are at the root of the structural barriers preventing the poor populations from participation in adult education and training. Overcoming these structural barriers will ultimately depend on the extent to which government's macroeconomic policies and the more specific policies on social welfare are capable of generating strong economic growth and distributing the benefits more widely and equitably than has been the case in the past (see Middlebrook and Zepeda, 2003). This involves integrating the urban and rural poor into growth sectors, overcoming regional disparities, and addressing wage compression to start reversing existing inequalities. This philosophy was strongly reflected among the representatives for rural development that we meet centrally and locally. We were told time after time of the absolute necessity of integrating adult education and training in a more holistic approach addressing various components of poverty.

86. A good example of how this principle has been put to practise is the *Secretaria de Agricultura, Desarrollo Rural, Pesca y Alimentación* (SAGARPA) development strategy. It consists of three closely integrated programmes aimed to support rural development. Together these programmes provide the rural populations with a capacity to cooperate, solve problems collectively, raise credit and develop the necessary skills through training.

Box 3: SAGARPA rural development programmes

The Support Program to Rural Investment Projects (Programa de Apoyo a los Proyectos de Inversión Rural), encourages the investments in capital goods of the rural population.

The Rural Enterprise and Organisation Strengthening Program (Programa de Fortalecimiento de Empresas y Organización Rural, PROFEMOR) is designed to assist the cooperative producers to achieve added value of the production line, to encourage the participation of the rural population in decision-making; to generate synergy between rural cooperatives and rural financial services; and to strengthen the bargaining and economic power for the priority groups (women and the young, Indian and elderly people who live in the rural areas).

The Program for the Development of Abilities in Rural Environment (Programa de Desarrollo de Capacidades en el Medio Rural, PRODESCA) whose purpose it is to encourage rural populations to identify business opportunities, start businesses, improve technical, commercial, organisational, managerial and financial knowledge and learn from successful experiences of manufacturing and financial restructuring.

The implementation of these three programs involves an educational component which is particularly elaborate in the two last programs. In the case of the PROFEMOR, the business promotion is carried out through the strengthening of the managerial staff by supporting exchange visits between similar businesses and seminars; the PRODESCA provides continuous professional or technical support for developing and starting the projects and to organize the training, technical advising and specialized consultancy they require.

87. The integration of informal and non-formal learning activities and the building of local economic capacity is appealing to groups that traditionally have seen no reason to engage in any structured learning activities. There is very little direct information on these programs but from our discussions with local representatives we got the impression that they are highly flexible and are well designed to respond to demand from the target population. However, during our meeting with the central office of INCA it became clear that some groups are being excluded as a result of a lack of information. For these well designed programs to reach their full potential, the dissemination problem needs to be addressed. Ideally there would a service provider in each community. We were pleased to note that according to the representatives there are now more financial resources available than ever before. But as we were told, "there is a need of results to compete for future funds and we have much more work to be done".

88. A core programme in the struggle against poverty through the enhancement of human capital is PROGRESSA (Programme on Education Health and Nutrition). This programme is an example of a

relatively new strategy labelled the conditioned transfer for education (CTE), (Morley and Coady, 2003). The educational component is primarily focused on encouraging children to stay in school by providing financial assistance to their families. For recipients to continue to be eligible to receive support they must keep their children in school. The programme integrates health, education and food components, and provides important insights and positive support for a holistic and targeted strategy. Similar to other CTEs, PROGRESSA uses a targeting approach to try to ensure that the resources reach the highest need households. Evaluations using a control group design indicate that as a result of targeting the programme has had a powerful effect on reducing poverty (Morley and Coady, 2003, p. 63). Unfortunately the programme is only available in rural areas and the large group of urban poor lacks a similar scheme. For adults, particularly the women, the program can be seen as an important vehicle towards informal learning. However, it would be of interest to explore how a more structured component of adult learning can be incorporated into PROGRESSA.

4.2.5 Regulatory inflexibilities

89. During our visits we became aware of some contradictions between objectives and regulations which prevent some groups to fully benefit from the well thought out programs. IDEA- Institute of Future Entrepreneurs encourages the establishment of micro and small-business ventures and works to protect new businesses in their formative years in order to promote growth and structure. Two central elements are training and micro financing. During our visit to Aguascalientes, we saw how programmes like IDEA can be effective at the state level. It was especially encouraging to learn that single mothers tend to benefit from these kinds of programmes. One interesting observation was that when micro financing was being provided without a training component the result tended to be poor. The experience of the local representatives is that training generally has been the most important component. Despite this we were told that it is difficult for the local representatives to raise enough money for training while they found it substantially easier to find money for the loan scheme. Another problem they face is red tape associated with getting central government funds. The same amount of paperwork is needed to secure \$500p as \$5,000,000p.

90. In some instances, the government's training regulations make it difficult to recruit those lacking a primary education. We visited ICATECH, whose mission is to develop education and training for the workplace. According to local evaluations 98, percent of trainees are trained successfully and two thirds of the participants have improved their position in the labour market. Presently these programmes do not serve those with extreme educational poverty. We learned that the local organisers were willing to work with illiterate groups. They had the motivation for this kind of work-related training, but they could not participate because of government regulations that stipulate that a participant needs to have completed basic education. However, in other cases, the regulations for the SICAT programme explicitly state that a completed basic education is not a requirement to obtain a grant. Another factor that might prohibit participation in ICATECH is that there is a fee for the programme. Fees appear to be a deterrent to participation in sponsored programmes.

91. The current skill policy focuses primarily on micro and small businesses and only rarely addresses the training situation in large companies. According to labour legislation in Mexico, companies are legally obliged to develop their own training programmes. However, as discussed above, the training offered by these employers is primarily oriented to management and the unskilled receive little, if any, systematic training. This trend was confirmed at our visits to some of the exemplary companies well known for their progressive training policies. In order to stimulate the investment in skills more broadly the present targeted policy strategy ought to be complemented by more general incentives. This is an area where new forms of cooperation between the social partners in competency accords might be very beneficial to the human capital effort of the government, and ultimately to the Mexican economy.

92. Finally we want to raise one issue about remuneration of volunteers in INEA programs that can partly be classified as a problem of regulation. In order to address the problem of volunteers providing inflated participation figures and reporting students that were only vaguely linked to the program, the rules were changed so that they would only be paid for the number of students that pass the scheduled exams. This may unintentionally have resulted in a situation where the volunteers concentrate on those that are already motivated as they are most likely to pass the exam. This pattern has commonly been noted in the literature (Rubenson, 2003). It is therefore not surprising that we learned from representatives in the field that the new system has created an incentive to recruit students most likely to succeed and to avoid trying to recruit others.

4.2.6 *Role of Non Government Organisations*

93. As pointed out in the background report, Mexico has a rich tradition of adult education located within social movements. Educational activities are closely integrated with their struggle for a more democratic society, women's and indigenous peoples' rights and sustainable development. During our visit we had an opportunity to visit with representatives from various NGO's and learn more about their rich activities. We were therefore a bit surprised that neither the National Programme nor The National Education Programme pay much attention to the role that non-government organisations could play in reaching the educational poor. Experiences in other countries - particularly the Nordic countries - have shown the very crucial role the NGOs can play in attracting a population that traditionally do not attain organised learning activities (OECD, 2003c). It is therefore encouraging that we could detect an increasing understanding among representatives from CONEVyT to combat barriers to learning, it will be important for them to have closer cooperation with the NGO's.

4.2.7 *Problems in serving the indigenous populations*

94. The adult education and training possibilities offered to the indigenous populations of Mexico portray the same serious shortcomings found in most other countries. During the last decade the government provided a variety of bilingual and mobile education programmes targeted to indigenous populations. Despite concerted efforts to improve the situation and to develop appropriate programmes the evidence so far indicates that many of these programmes are not adapted to indigenous needs and aspirations (Wodon and Velez, 2001). This was also the key message we heard at our meeting with representatives of the Chiapas Council for Indigenous Project. The concerns can be grouped in three main categories, lack of control, lack of relevance and connections to indigenous culture, and problems in accessing existing resources. The root of today's problem is a lack of indigenous self-government that would provide control over educational resources and increased possibilities to establish indigenous centres for adult and higher learning. The curriculum and textbooks commonly reflect a traditional national philosophy and do not build on indigenous traditions, culture and aspirations. For example, they are void of indigenous research on their own history, indigenous science or indigenous oral traditions. Often teaching materials are presented in Spanish and not translated to the appropriate indigenous language. Another serious problem for the indigenous community has been the problems they have faced in accessing federal resources for educating their people. In some instances regulations on student numbers and similar specifications make the application ineligible for support. There is also a sense that independent organisations like the Ethnical Autonomous Region are being denied funds as the government would lack control over these funds once they were allocated.

4.3 *Improving the quality and effectiveness of learning*

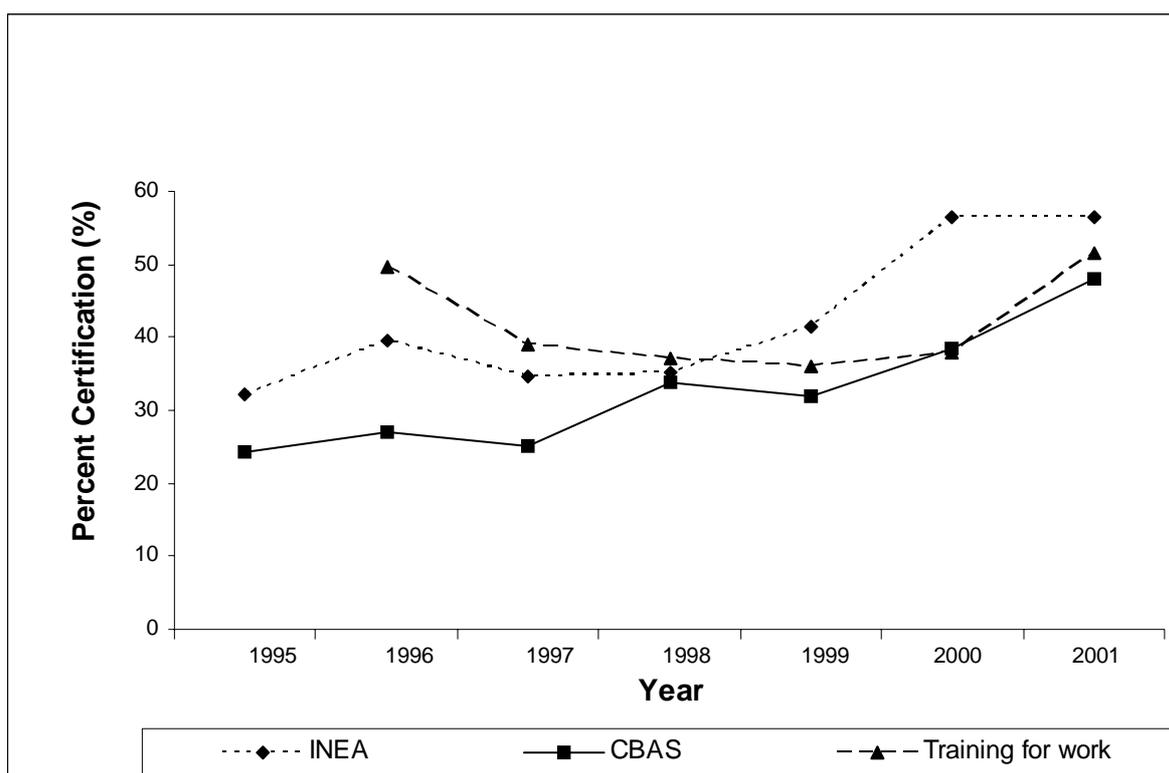
95. There are three main issues regarding quality of adult education and training in Mexico:

- dropout rates

- instructor qualifications
- evaluation procedures

96. Non-completion is a major problem in Mexican adult education and training where close to half of the participants do not receive a certificate, see Figure 2.

Figure 2: Certificates in adult education as a percentage of number of participants, 1995-2001



Source: Directorate of planning, INEA. DGPPP. SEP.

97. During our visit, we got a glimpse into the difficulties in recruiting and retaining participants. Even though most potential participants claim they are ready to accept the services, their everyday struggle for existence complicates their ability to attend. Of the people who do begin a programme, a substantial number drop out. Experienced adult educators suggested that experiences from programmes like PROGRESSA could provide directions for measures to overcome these problems.

98. Despite a spirit of cooperation, altruism and initiatives for self-help in the system, necessities of everyday life are causing many to drop out from the programmes. At our visits we were impressed by the dedication and knowledge that most instructors and administrators displayed. However, we also learned about problems caused by some instructors with little knowledge and experience of teaching adults. It was pointed out to us that a sometimes inadequate school environment and lack of resources make it harder to keep some students in the programme. As discussed above, there have been major reforms in the teaching methods of basic education in Mexico. The introduction of the MEVyT model has been very resource demanding, but judging from the data in Figure 2, it might have contributed to the major improvement that has taken place. In 1995 the completion rate in basic education stood at around 30 per cent but had increased to just over 50 per cent in 2001. This improvement is even more impressive when considering

the changes in programme composition. Recently there has been a shift in the student body with relatively fewer enrolled in literacy classes which traditionally had a relatively higher completion rate to more students enrolled in secondary education where dropout rates tended to be higher. Using INEA as an example, in 1996 about 50 per cent of those in literacy classes received a certificate, compared to only 12 per cent of those in primary education and 26 per cent of those taking secondary education. By 2000 the literacy classes had maintained the same level of certification but the figure for primary education had increased to 48 per cent and was as high as 65 per cent for those in secondary education. However it must also be noted that this improvement came at a time of drastically decreasing enrolment. While the curriculum reforms had a positive impact, the improved result could have been caused by a change in recruitment strategy, whereby those more likely to complete have been recruited.

99. The Mexican system for basic education relies heavily on volunteers, and unfortunately, most of them often lack the adequate training for teaching. This is very difficult to address, as any major reform would demand a substantial increase in financial resources.

100. In the broad category of training for work, the level of certification is about the same in 1996 and 2001, and according to the data in Figure 2, the major decline in the late 1990s seems to have been addressed.

101. A major problem in addressing quality and accountability is the lack of well developed evaluation procedures for all levels of the system. At the federal ministerial level, more attention is being given to the collection of appropriate micro data sets. However, from the materials and briefings, we get the impression that policies mainly are based on empirical findings drawn from simple evaluation studies. It does not seem that key ministries have the capacity to apply state of the art methodologies like random assignment of programmes among those who are eligible or statistical matching to estimate the treatment effect of programmes (see Dolton, 2004; Heckman et al, 1998), which increasingly are becoming the preferred method within OECD countries. Consequently, key decisions on reform strategies have to be made in the absence of robust knowledge of the effectiveness of policy interventions. However, even under present conditions federal institutions can provide significant assistance to the states in the area of labour market information and evaluation models. The Ministry of Labour collects comprehensive information on labour market and training needs at the state and community level that currently does not appear to be used to effectively design adult learning programmes at the local level. While local adult education providers may readily identify the groups or populations that seek adult education and training, they are less likely to have detailed information on local labour market conditions, which may change over time.

102. At the programme level, there was at best selected empirical evidence about the outcomes. A lack of resources, as well as capacity, has prevented more thorough evaluations, particularly of long term effects.

4.4. Policy coherence in an integrated approach

103. The overall Mexican policy strategy for promoting adult education and training has three significant characteristics that seriously impact its efficiency:

1. a multitude of actors
2. lack of co-ordination
3. over-regulation

4.4.1 A multitude of actors

104. The background report and the site visits suggest an impressive reform agenda of new or revised programmes in adult education and training aimed at promoting the economy and health; and finding ways to combat poverty and social exclusion. These efforts reflect Mexico's rich and complex system of adult education and training that involves: a variety of federal and state ministries; the private sector; NGOs; and a long list of educational providers. At the federal level adult education and training is addressed by the Ministry of Education, which has the primary responsibility for basic adult education. The Department of Labour and Social Security promotes adult education and training under its employment support scheme while the Ministry of the Economy runs programmes aimed at increasing the productivity of the workforce. The Ministry of Agriculture, Rural Development, Fishing and Food has a variety of extension programmes that involve organised forms of education. Finally, several ministries are directly involved in the struggle against poverty and are responsible for programmes directed to high marginalized areas (e.g. the Ministry of Social Development, The National Institute for Women, the Department of Labour and Social Security and the Ministry of Economy). Most of the states have programmes that mirror or complement the federal initiatives.

105. The picture is further complicated by the fact that there can be several diverse educational providers linked to different ministries, the private sector or NGOs that offer the actual training. In the case of the Job Training System (SICAT), which is administrated by the Ministry of Labour and Social Security, the educational module can be offered either through a decentralised federal training body, institutions that are under the federal Ministry of Education, technical institutes that are under state authority or by private providers receiving public funds. Basic adult education falls under the Ministry of Education but the actual education can be performed by INEA, a decentralised national institution specialising in adult education or by the department of Public education and to a much lesser extent by NGOs. Similarly, a variety of federal, state, NGOs and private providers are delivering the educational component that form a part of poverty reduction initiatives.

106. There are a variety of well conceptualised programmes focusing on rural development linked to *Secretaría de Agricultura, Ganadería, Desarrollo Rural, Pesca y Alimentación* (SAGARPA) in the Department of Agriculture and Rural Development. One of these, INCA-RURAL, has been in operation for 30 years and is located in the *Instituto Nacional para el Desarrollo de Capacidades del Sector Rural*. Its central purpose is to co-ordinate the work of adult educators, to train professionals for work in rural communities, and to establish assessment and certification systems. INCA stresses the importance of the whole rural environment and the importance of social capital in rural development.

107. The newly established SINACATRI, the National Comprehensive Rural, Training and Assistance System, is responsible for the management, planning and delivery of training and technical assistance activities for the rural sector. Several other programmes also focus on various aspects of rural development – *Programmea de Fortalecimiento de Empresas y Organización* (PROFEMOR), *Subprogrammea de Desarrollo de Capacidades en el Medio Rural* (PRODESCA) and *Instituto Natcional de Ecología* (INE) – to name some of the most important. The issue of duplication became evident during our meeting with agricultural secretariat officials who stated that 'often one office does not know what the others are doing,' confirming the problem of co-ordination and duplication in programmes. It was pointed out that improvement at the operational level would require the support of various ministers as well as new forms of co-ordination at all three levels of government: local, regional and national. The concerns expressed by federal officials also surfaced in the meeting with local officials in Chiapas.

108. As mentioned above, The Ministry of Labour and Social Security and the Ministry of Economy are the two main providers of job training. The Ministry of Labour and Social Security runs a programme called SISCAT, which provides training for self-employment, training for unemployed professionals and

other unemployed groups, as well as training to medium-sized and large companies to assist them in meeting their specific demands for staff training. At the same time the Ministry of Economics offers the PROMODE programme, focused on increasing the competitiveness of micro, small and medium-sized enterprises by promoting modernisation through the provision of technical assistance, general training and training of future entrepreneurs. PROMODE promotes the development of an entrepreneurial culture in coordination with educational institutions in Mexico. The differences between the training of the existing workforce provided under SISCAT and PROMODE is that the former provides basic education while the latter provides a more advanced education. Recognising these differences, the issue of co-ordination between the two ministries and the obvious dangers of competition between government departments still remains.

109. The overall policy strategy raises the question of the capacity of the bureaucracy to effectively deal with the multitude of programmes without unnecessary duplications. Information provided during the site visits led us to believe that the current strategy, with its flurry of reform activities, comes with some serious costs to efficiency and may result in less than optimal use of scarce resources and suggests an urgent need for better coordination among ministries and other institutions that deal with adult learning. There also seemed to be a lack of information on which to compare the effectiveness of various options under the same initiative. It is of interest to note that findings by Calderón-Madrid and Trejo (2002) on the impact of the Mexican training programmes for unemployed workers in the late 1990s suggested that some of the educational providers (private providers and CEBETI that is under the Ministry of Education) were more successful than others.

4.4.2 Lack of co-ordination and over regulation

110. The large number of programmes and different providers creates difficulties at the state level. In Chiapas, state officials suggested that they have to deal with 22 different federal agencies to implement training programmes. Not only is there a large number of agencies to deal with, but there is also a perceived lack of local control that creates difficulties at the state level. The National Development Programme for the period 2001-2006 points to an urgent need to advance the process of decentralisation.

111. A long history of over-regulation has led to inefficiencies among local training institutions in allocating (or reallocating) resources. This became evident during the visits to Chiapas and Aguascalientes, where we were informed of the unusually long delays in transferring funds for programmes. In some cases, funds that were to have been expended for the programme by the end of December did not arrive until the beginning of December. This delay meant that the classes were already well underway, and made it impossible to pay professional fees on time. We also learned of cuts to budgets that were either made without consultation, or announced late in the budget year.

112. Another concern at the state and local levels had to do with the direction and content of certain training programmes that were conceived at the federal level. In some cases, lack of coordination resulted in unsuitable programmes being offered, for example training in carpentry where there was a much higher demand for Eco Tourism. By improving coordination between the two levels of government and by reducing micro management by federal agencies some of the current inefficiencies can be reduced, and the content and support for training better adjusted to the local needs and conditions.

113. The variations in labour standards and certification point to the difficulties in creating national standards and the differences in practices at federal, state and municipal levels. In 1995 the Labour Ministry embarked on an ambitious project, CONOCER, to create a modern system of national standards and certification following the NVQ system in the UK. Today CONOCER operates a highly sophisticated programme with 600 national standards, of which 80 per cent are in use. There are currently 30 evaluation agencies – 15 of which are private – that can provide certification based on these national standards.

114. At the same time there is a system of certification at the state level and yet another layer of certification at the community level. These two grades of certification are different from the one based on the CONOCER model, and do not provide certification of national standards. Their advantage is that the standards used seem to be easily developed, they are readily accessible and perhaps more importantly, cost much less than the national certification. Judging from the information we received during our visits with local companies, representatives from state institutions and local providers, these state and/or local certificates were accepted in the local labour market and did not constitute any form of handicap for those workers who possessed them. What is less clear from the information we were able to gather, is how useful these credentials would be in the event that an individual moved to another area. The fact that these community or state level credentials appear to be readily accepted is an indication that the notion of national standard is not yet a universal concept in Mexico. This will not happen unless there is more uniformity in the practice of certification across Mexico.

5. CONCLUSIONS AND RECOMMENDATIONS

115. In this final section we present broad conclusions and draw together the various recommendations we have made throughout this Note. The recommendations are framed within two broad understandings of the adult education and training situation in Mexico.

1. There exists a fruitful adult education and training base on which to build

116. During our visit we had a strong sense that policy makers at all levels of government increasingly have come to the realisation that to address Mexico's social and economic challenges the country needs to build a strong and vibrant adult education and training sector. It is our conclusion that Mexico already has in place several initiatives and institutions in different sectors of society that, taken together, form a fruitful base for expanding the role of adult education and training. In rural development and poverty reduction there exist a range of well conceptualised integrated social assistance programmes with targeted education subsidies. In the area of basic education, INEA, with its long and impressive history of delivering flexible and diverse programmes across the country, has initiated a very exciting reform programme - Education for Life and Work - that will be an important cornerstone in future reforms. The programmes for unemployed workers (SICAT) and CIMO are subsidising on-the-job-training and provide a nucleus for an active labour market strategy. The well-developed skill certification programme (CONOCER) operated jointly by the secretaries of Education and Labour with participation by private firms is an important vehicle for making skills transferable and recognisable. Furthermore, Mexico has a long and rich history of popular adult education provided by non-governmental organisations directed at creating social capital and enhancing civil society. The success of the existing 'system' is somewhat restricted by the broader structures, and inefficiency in existing arrangements. There is a need for expansion and adjustments of the present 'system'.

2. Educational reforms can not do it alone

117. Reforming and expanding opportunities for adult education and training is central to any ambition to improve the economy, reduce poverty and strengthen civil society. However, it is important to recognise that adult education and training reforms in and of themselves have a positive, but limited, capacity to contribute to economic and social development in Mexico. At a macro level the challenge is how to integrate adult education and training reforms into an economic and poverty strategy with a vision

of how social cohesion and income redistribution can be achieved in the face of substantial inequalities and volatile incomes, both of which are aggregated by globalisation processes (Ruprah, 2003). Further, fostering a new working culture, a defining element in the human capital strategy, is dependent on a renewed and enforceable social contract and an organisation of work that stimulates skills improvement as well as their use in production.

118. The recommendations address six specific aspects of adult education and training in Mexico:

- Role of the state
- Inefficiencies
- Basic education
- Job related training
- Indigenous education
- Evidence driven policy

5.1 Role of the state

119. The need to strengthen adult education and training brings up crucial issues around the relationship of the state and its citizens; an understanding of the responsibility of the state, the market and the individual that should inform state intervention in adult education. It is commonly argued that the state should treat citizens not just with concern and respect, but with *equal* concern and respect (Dworkin, 1977). In accordance with this principal, both Rawls and Dworkin argue for justice in resource allocation. However, as Amartya Sen (1982) stresses, the resource argument is not a sufficient condition for a just society. Instead he introduces the concept of basic capability equality referring to the need to take into account, among other things, differences in those abilities that are crucial for citizens to function in society.

120. From this perspective we would encourage a review of the relative share of public expenditure that is allocated to adult education and training, particularly in comparison to public investments in other forms of education. At this point we wish to reiterate the observation, discussed above, that judging from the share of public expenditures on education devoted to adult education, the government's position on the importance of adult education and training, can be perceived as largely rhetoric. A basic capability approach would suggest a review of the share of resources going to those individuals in severe educational poverty, e.g. in the area of labour market training programmes.

5.2 Inefficiencies

121. We strongly recommend that various inefficiencies in the system such as; programme duplications, lack of synergy, over regulation, and insufficient decentralisation, not be addressed individually but as part of an overall cohesive strategy. Such an approach could preferably be built around an expanded mission and jurisdictions for the recently established CONEVyT. This would increase the possibility of integrating strategies across what is now quite strict ministerial divides, while at the same time, simplifies the relationship between the different levels of government. The new arrangement may also be better able to co-operate with the non-formal sector that has a considerable contribution to offer in strengthening civil society. As evident in the Thematic Reviews of Adult Learning in the Scandinavian countries this sector can play an important role for human as well as social capital generation (OECD, 2003c).

122. In order to maximise relevance and capacity to quickly respond to changing local conditions a strengthened role for CONEVyT should be complemented with a stronger direct control over programme decisions by state officials.

5.3 Reforming K-12 education

123. As long as the K-12 system continues to produce educationally disadvantaged school leavers at the present rate no reforms of adult education will have sufficient impact on educational poverty in Mexico. For Mexico to realise its ambitious economic social goals it is absolutely necessary that the efficiencies of the K-12 system be improved. However, this should not be taken as an excuse to continue to under invest in the adult education sector. By strengthening the learning capabilities of the educational poor they are in a better position to help their children and an investment in adult learning will have impact on the following generation.

5.4 Basic education

124. Recent reforms by INEA to introduce *Modelo Educación para la Vida y el Trabajo* with its integration of a students' social and working life significantly improves the ability to reach those suffering severe educational poverty. It breaks the clear distinction between academically and vocationally oriented studies that for so long has characterised Mexican education. We strongly encourage its further development and a concerted effort to produce and distribute appropriate learning materials.

125. The Examiners have an understanding of the rationale for changing the remuneration to volunteers from being paid according to the number of students, to linking rewards to the number of students that passed the examination. However, as discussed above the new procedures bring with them some unanticipated negative outcomes that may effect the recruitment of the most vulnerable groups. We encourage INEA to revisit the issue and try to find models that will address the issue of inflated enrolment rates, and can avoid the problems with the present system.

126. The participation figures in basic adult education reveal large regional differences that are not explained directly by reference to degree of marginalisation. We therefore suggest that it would be important to examine these differences further in order to learn from the states that seem to be particularly successful.

5.5 Job related training

127. The findings suggest two main concerns that need to be addressed. First, the limited capacity of central programmes like SICAT and CIMO to reach those with severe educational poverty should be reviewed and complementary structures put in place. Second, market failures in the training section suggest a stronger government involvement not only in promoting small businesses but also in promoting training more generally, including large firms. This suggests a need to experiment with various incentives like tax benefits for employers and/or employees that invest in skill development and/or forms of training levies.

5.6 Indigenous education

128. As in almost all other countries, Mexican approaches to improve educational poverty among the indigenous groups have not met with much success. We want to stress that a necessary condition for improving the educational situation of the indigenous populations is that they receive a fair per capita allocation of GNP. Further, experiences from around the world, particularly New Zealand, suggest that to reverse the situation the indigenous groups need to be granted direct control over their education and be able to develop their own learning institutions including indigenous universities. *KUkulu Kuhana* in

Hawaii provides an example of how indigenous people can learn to function effectively in the society in which they live by gaining the ability to practice a traditional indigenous lifestyle, as well as developing the necessary skills to become positive contributors to mainstream society. The focus on learning from the past provides tools for surviving the future (Kahakalau, 1992).

5.7 Evidence driven policy

129. Throughout the Note we have mentioned the restricted capacity at various levels for in-depth evaluations. This calls for measures at different levels of the system.

130. At the ministerial level there is a need to develop the capacity to more accurately assess the effect of policy intervention on labour market and poverty reduction by starting to implement the most advanced evaluation methods. In order to move in the direction of evidence based policy making, Mexico needs to further improve the collection of micro data sets and train policy analysis in the use of recently developed econometric techniques like matching estimators for the evaluation of treatment and programme effects.

131. At the institutional level we have followed with interest the work of the recently created *Instituto Nacional para la Evaluación de la Educación* (INEE), which presently focuses its attention on the formal educational system, but could also be a model for programme evaluations in adult education and training.

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ANNEX 1:

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ANNEX 3:

PROGRAMME OF THE VISIT

Wednesday 24 September – México City

- 09.00 *Meeting with Officials of the Labour Secretariat to discuss public policies, training and employment.*
- General Coordination of Planning and Sectorial Policy (Secretariat of Labour)
 - Support and registration for training (General Directorate for Training and Productivity); Training Program and Employment (General Directorate of Employment, Secretariat of Labour).
- 11.30 *Meeting with Representatives of Business Chambers and Unions*
- 15.30 *Visit to the BIMBO bakery and the Mexican Foundation for Rural Development (NGO Businesses)*

Thursday 18 September – Mexico City / Tuxtla Gutiérrez (Chiapas).

- 09.00 *Meeting with Officials of the Rural Development and Agriculture Secretariat to discuss*
- training in rural areas (Vice secretariat of Rural Development, Agriculture Secretariat)
 - training of technicians and professionals (National Institute for Skills Development in the rural sector).
- 12.00 *Meeting with Officials of the Economy Secretariat to discuss:*
- training for employees and employers of Small and Medium Size Enterprises.
- 19.00 *Visit to the Community Plaza of the Mexican Labour Confederation (CTM),
Meeting with Union Members and users of the Plaza*

Friday 19 September - Chiapas

- 09.00 *Visit to* Training Centre for Industrial Technicians and Meetings with Educational Officials (Adult Education and Lifelong Learning)
- 12.00 *Meeting with* Officials of Economic Development, Labour, Rural Development, Employment *and* Micro-Enterprises Secretariat of the State of Chiapas
- 16.30 *Visits to* an NGO *and an* enterprise
Art Crafts and an automotive parts plant

Saturday 20 September –San Cristobal de las Casas

- 09.00 *Visit to the* Community Development Centre “La Albarrada” *and to the* Community of San Juan Chamula
- 11.00 *Visit to* INEA’s local Headquarters
Discuss projects for indigenous people
- 12.30 *Visit to* Labour Organisation projects (textile plant)
- 14.00 *Interviews with* local NGO’s and cultural missions

Monday 22 September – México City

- 09.00 *Meeting with* Officials of the Education Secretariat *to discuss:*
- Basic education for adults (National Council for Education and Lifelong Learning and National Institute for Adult Education, CONEVyT-INEA)
 - Job training (Technological, Education and Research Vice Secretariat and Directorate of Centres for Job Training, Education Secretariat)
 - Middle education (General Coordination of Middle Education and Directorate of *Bachillerato*)
 - Recognition of knowledge, Agreement 286 (Accreditation, Incorporation and Equivalences Directorate)
 - “ALLs in México” (INEA and National Institute for Educational Evaluation)
- 12.30 *Meeting with* Officials of the *Oportunidades* Program (Social Development Secretariat, SEDESOL).
- 16.00 *Visit to* services
Community Plaza (Job training Centre and Enterprise with integrated education services).

Tuesday 23 September – State of Aguascalientes

- 09.00 *Visit to NISSAN plant and Training Centre*
- 12.00 *Meeting at the Governor's Office to discuss training supply in the State of Aguascalientes*
- 13.30 *Meeting with the State Governor, Mr. Felipe González González*
- 16.00 *Visit to the Community Plaza, Mexico Solidaridad II*
- 18.30 *Discussion on the certification for low-skilled youth and adults*

Wednesday 24 September - State of Aguascalientes

- 09.00 *Discussion on Training Projects for employment and self-employment developed by the social sector in Aguascalientes*
Institute for Development of Entrepreneurs
- 11.30 *Training Projects coordinated by the Education sector*
- 13.30 *Training Projects coordinated by the State Employment Services*

Thursday 25 September – México City

- 09.00 *Visit to the Coordination Office of the Open University and Distance Education (National Autonomous University of Mexico, CUAD-UNAM)*
To see an example of Open Higher-Education and continuous education in action
- 10.45 *Visit to the Training Institute of the Chamber of Construction Industry*
- 16.00 *Meeting with the Chairman of the Latin American Adult Education Council and representatives of NGO's.*
- 17.00 *Meeting with academics and experts in the field of Adult Education to discuss the findings of the OECD review.*

Friday 26 September – México City

- 09.00 *Meeting with the Members of the Steering Committee to present the preliminary conclusions of the OECD review team and agree on future activities:*
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Marco Polo Bernal
Daniel González Spencer
Juan Domingo López Buitrón
Felipe Martínez Rizo, Director of the National Institute for Educational Evaluation
Carlos Zarco, President of the Adult Learning Council for Latin America