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Global Education Policies versus local realities. Insights from Uganda and Mexico

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ABSTRACT

National education policies often emerge from the global arena. These global policy norms hold the promise that reforms will produce similar education and development outcomes in different contexts. However, research on *how* and *why* global education reforms are practised 'on the ground' and with *what effects* is still scant. In this paper, we investigate how two global education agendas, namely Universal Primary Education (UPE) and Competency-Based Education (CBE), are enacted and re-contextualised in Uganda and Mexico. By drawing on data obtained from extensive field research in both countries, we explore how these global policies were translated into practice within their situated, professional, material and external contexts. Our research shows that in both cases the enactment of global policies differed widely from universal agendas. We, therefore, argue that global education norms in education can also reproduce existing inequalities or even lead to new forms of inequalities at the local level.

Introduction

National education policies increasingly emanate from the global education arena (Verger, Novelli, and Altinyelken 2018). This trend is reflected in global frameworks such as the current Sustainable Development Goals (SDGs) or the Education for All (EFA) global movement, which has now acquired the status of Global Education Policies (GEPs). GEPs can be understood as 'global education agendas' or 'global education norms' (Verger, Novelli, and Altinyelken 2018) At the same time, education is approached as the means to facilitate the entry of developing countries into the global knowledge economy. International policy norms such as Universal Primary Education (UPE) or Competency-Based Education (CBE) aim to facilitate this. Within this context, education emerged as *the* strategy for development to ostensibly tackle several forms of socio-economic inequality in low and middle-income countries. While there is a growing interest in the study of the re-contextualisation of global policies such as UPE (cf. Nishimura et al. 2009; Langsten 2014; Turrent and Oketch 2009; Ekaju 2012) and CBE (cf. Frank Bristow and Patrick 2014; Kouwenhoven 2009; Boahin and Hofman 2012; Tromp 2016) most studies either focus on measuring progress of policy

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implementation, or on one phase of the policy process, for example, financing or the translation of GEP in national education sector plans (cf. Mausethagen 2013). Moreover, research shows a global convergence of policy discourses, but does not provide sufficiently rich empirical evidence of the re-contextualisation and effects of global policy discourses in local places (Verger, Novelli, and Altinyelken 2018).

Against this backdrop, we ask how standardised global norms in education are transformed by multiple actors such as international institutions, aid agencies and national governments into local practices. In order to understand how education reforms that draw on global norms are enacted, and with what consequences, we argue that their enactment needs to be studied in different contexts. Doing so, we draw on a theoretical framework that allows us to place the *enactment* (Ball, Maguire, and Braun 2012; Braun et al. 2011a) of global norms within their *situated, professional, material* and *external contexts* (Braun et al. 2011b) which are all embedded in the wider *political economy* context of education sector governance (c.f. Gradstein, Justman, and Meier 2005; Novelli et al. 2015). This theoretical angle will help us to assess and analyse how UPE and CBE reduced but also aggravated inequalities in education.

Our two case studies, UPE in Uganda and CBE in Mexico, were chosen based on the rationale that they are illustrative (see: Gerring 2004) examples of what Verger, Novelli, and Altinyelken (2018) call 'Global Education Policies' (GEPs) that significantly shape education-sector plans at the national level in each country context. UPE emerged in the 1990s as a universal goal to make primary education accessible to all children and to massively reduce illiteracy worldwide (UNESCO 2000). CBE, on the other hand, focuses on what learners can do with their knowledge rather than what they know. The focus is on objective and observable outcomes which can be measured (Burke 1989). During the last two decades, both UPE and CBE have become linked to discourses on quality education in particular in the scope of goal number 4 in the newly introduced SDGs (World Bank 2017).[1] Their appeal is that in an era of a global knowledge economy, UPE and CBE are perceived to be approaches that produce the human capital, in the form of knowledge, skills and attitudes of students entering the workforce, that enhances countries' competitive advantage in the global marketplace (Frank Bristow and Patrick 2014; OECD 2005; Ananiadou and Claro 2009).

Accordingly, the structure of our paper is as follows: By drawing among others on the work of Ball, Maguire, and Braun (2012) we first introduce our theoretical approach and explain how we assess the effect of global policy frameworks in different local realities. After a short outline of our research methods, we continue to analyse each of our cases individually.[2] In our concluding section, we critically reflect on why it is essential to pay attention to context when designing GEPs and norms.

Re-contextualising global policy norms in local contexts

Increasingly, similar education policy norms and a common set of education policy jargon are being adopted in countries that are incredibly diverse both culturally and in terms of economic development (Verger, Novelli, and Altinyelken 2018). These policy norms are rarely re-contextualised into national policy texts or practices in pristine form, as they 'map onto local practice in contingent, contested, inflected and thus unpredictable ways' (Burbules and Torres 2000, 102).

When studying education policies, the emphasis has often been on policy implementation. However, we argue, a theoretically richer concept for understanding how policies are practised and produce effects in education is policy *enactment* (Ball, Maguire, and Braun 2012; Braun et al. 2011a). Policy enactment shifts the focus to how educational institutions actually deal with policy demands; basically, how schools and agents within them creatively interpret and translate such policies into practice within their given contextual positions and resources. By contrast, 'policy implementation studies conceive of the school itself as a somewhat homogenous and decontextualised organisation that is an undifferentiated "whole" into which various policies are slipped or filtered into place' (Spillane 2004 in Maguire, Braun, and Ball 2014, 486).

Thus, divorcing schools and agents from their local, national and global contexts runs the risk of not seeing the full picture. In this, Braun et al. (2011b) identify four contextual (overlapping) spheres to better explain this interplay. These are:

(1) *Situated* contexts (e.g. locale, student intakes, settings);
(2) *Professional* contexts (e.g. teacher and staff values and experiences, policy management in schools);
(3) *Material* contexts (e.g. staffing, budget, technology);
(4) *External* context (e.g. quality of local authority support, pressures from evaluations).

In analysing these four spheres, we will showcase, that unless contextual elements are brought to the forefront one cannot hope to have a comprehensive understanding of *how* policy is translated from policy text into policy practice within classrooms and *why* it is enacted in the way it is. Moreover, all four areas help us to acknowledge that processes of policy enactment are embedded in and influenced by *political* and *economic* structures that shape educational inequalities at a larger scale (Gradstein, Justman, and Meier 2005; Novelli et al. 2015). Besides, the way in which education is financed, organised, managed, distributed and above all made accessible also influences how policies are enacted (Dahl-Østergaard et al. 2005).

Notably, our analytical approach should not be misinterpreted as an all-encompassing framework. Rather, we aim to shed light on how similar issues affect enactment processes of GEPs, which then also has implications for their outcomes. In line with Ball, Maguire, and Braun (2012), Buenfil-Burgos (2000) argues that global policies imply certain homogenisation of values and measures, but that these are mediated by historical, cultural, economic and political conditions in particular sites. Appadurai (1996) also uses the role of agency and appropriation to make a case against the idea of globalisation as a totalitarian transformation towards the same, emphasising that policies are not embraced in all places equally. This also has important implications for development. While globalisation may unfold as processes of standardisation, unique appropriations can also lead to a proliferation of hybridity and even intensified inequalities between and within nations (Hill and Kumar 2012).

Methodology

Our paper is based on in-depth fieldwork conducted by each of the authors in one country in the scope of different projects.

In *Uganda*, data were collected between 2015 (January – April) and 2017 (February – May) by Simone Datzberger. This paper is one, out of several research outputs, emerging from two larger research projects.[3] Interview questions revolved around a wide range of themes which were all related to formal and non-formal education programs, structures, policies and governance in Uganda. Research took place in a variety of sites in the country comprising rural and urban environments in northern, central, north-eastern and south-western Uganda, namely: Adjumani, Gulu, Kampala, Karamoja and Mbarara. Methods of data collection involved in total 89 interviews with a variety of actors situated at different scales from the Ministry of Education and Sports (MoES), civil society organisations, school officials, education planners, teaching professionals or local academics. All interviews were recorded, transcribed and subsequently coded and analysed by making use of Atlas.ti.

As for *Mexico*, fieldwork was undertaken by Rosanne Elisabeth Tromp between June 2012 and June 2014. This paper is one, out of several research outputs, emerging from a larger research project[4] conducted by the author, which consisted of 121 group and individual interviews with different policy actors, such as international organisations, Ministry of Education (MoE) officials, teachers' unions and teachers that operated at the international and the Mexican national, state and school scale. The selection of actors was motivated by a wish to understand how actors translated and enacted the reform within their situated, professional, material and external contexts. To facilitate in-state comparison of how different contexts interact with the enactment of the reform, rural, urban, indigenous and alternative[5] schools were selected. In addition, observations were conducted such as teacher training sessions, MoE reunions and teachers' union protests, as well as 12 schools that were located in different socio-economic contexts in the states of Durango and Michoacan. These two different states were chosen on the basis that their political context vastly differed,[6] yet the socio-economic context was similar,[7] which facilitated the within country comparison of the enactment of the reform.

Throughout the paper, we synthesise general findings from each of our projects. We approach our two examples UPE in Uganda and CBE in Mexico as *illustrative case studies* (Gerring 2004) with the aim to describe not only the challenges of policy enactment of GEPs in both contexts but also to explain why context matters. By focusing on two policies we aim to illustrate how context (structural aspects) and agents (e.g. MoE or teachers) mediate global education norms. Both studies are informed by initial policy document analysis ranging from international development frameworks to national education sector plans and policies. When we refer to data from our interviews, we opted to not reveal the identity of our interviewees but refer to their professional background or institutional affiliation.

From Global Education Policies to contextualised education practices in Uganda and Mexico

Uganda

UPE as a Global Education Policy

The origins of UPE date back to the 1990 Jomtien Conference on *Education for All* (EFA), where it was agreed to make primary education accessible to all children and to massively reduce illiteracy before the end of the decade.[8] The Jomtien Conference was the first of its kind, where the international community including major development agencies and the World Bank reached a consensus on attaining EFA. Education was reaffirmed as a fundamental human right, and delegates agreed on targets and strategies to meet global basic learning needs by the year 2000. This was re-affirmed at the World Education Forum in Dakar (2000) as the Jomtien targets were not achieved by 2000. UPE was then subsequently introduced as Goal number 2 of the MGDs. The aim was to ensure by 2015 that boys and girls everywhere, will be able to complete a full course of primary schooling.[9] As a result of these efforts, governments worldwide have expanded their education systems, built more schools, deployed more teachers and in some instances even abolished school fees. The number of out-of-school children of primary school age fell by 42% between 2000 and 2012 (UNESCO Institute for Statistics, and UNICEF 2015, 13). The MGDs still failed to meet its targets. In 2017, 63,7 million children of primary school age continue to be out of school worldwide.[10]

The number of primary out-of-school children is the highest in sub-Saharan Africa with 34 million, which are expected to never go to school if current trends continue. In the scope of the SDGs, UPE was further expanded under target 4.1, aiming at ensuring that all girls and boys complete equitable and quality primary and secondary education leading to relevant and effective learning outcomes.[11]

Political-economy context of education in Uganda

Since independence in 1962, there have been several attempts to reform the education sector in Uganda. The 1989 *Education Policy Review Commission Report* in conjunction with the 1992 *Government White Paper on Education in Uganda* laid the foundation for several education reforms. In addition, forces of globalisation including international pressure to introduce multi-party elections led Uganda to commit, rhetorically at least, to the concepts of liberal democracy and market openness. In this endeavour, education came to be seen as an essential ingredient for economic and social development (Datzberger 2018). Today, education sector reforms continue to be challenged by slow and weak policy implementation in areas such as teacher training capacitates, infrastructure and livelihood generation for youth. Youth unemployment in Uganda is one of the highest in Africa. Estimates range from 62% to 83% of the youth aged 18–30 years as being unemployed (Mwesigwa 2014). Uganda is a low-income country with a GDP per capita equivalent to 3% of the world's average, though the situation is slowly improving. In addition, ineffective decentralisation processes and the emergence of low versus high-quality schools (or privatisation), as well as corruption, challenge equality and social cohesion within and through education (Datzberger 2018).

UPE in the Ugandan education policy

After Uganda's independence from British Occupation (1962), the government created an Education Review Commission which placed a strong emphasis on the importance of primary education as an essential precondition to build and develop a new nation. Yet, the political turmoil that persisted over the following two decades severely damaged education expansion in the country, rendering UPE into a mere slogan (Nishimura et al. 2009, 147–148). The budgetary allocations to education significantly declined from 3.4% to 1.4% and all the financial burden were borne by parents (Nishimura et al. 2009, 147–148). In the scope of President Yoweri Kaguta Museveni's election campaign (1996) promises were made to abolish school fees and meet the cost of primary education per family (Hardman et al. 2011, 677–678). In 1997, UPE was introduced by the GoU and extended to the EFA framework, to allow all people that wanted to access primary education to do so. The government committed to (ODI 2006):

- Provide the facilities and resources to enable every child to enter and remain in school until the primary cycle of education is complete;
- Make education equitable in order to eliminate disparities and inequalities;
- Ensure that education is affordable by the majority of Ugandans;
- Reduce poverty by equipping every individual with basic skills.

As a result, education expenditure as a percentage of GDP increased from 1.6% to 4.0%, and the share of primary education in the total education expenditure rose from 40% to 65–70%. In addition, the policy set out parental responsibilities including provision for lunch, school uniform and shelter; while school fees, textbooks, teacher salaries and infrastructure were supposed to be provided by the government (Nishimura et al. 2009, 148). The government also abolished the Parent Teacher Association (PTA) fees with an exception for the urban areas where voluntary labour is hard to obtain and cost of utilities is high (Nishimura et al. 2009, 148). To this day, UPE is funded through capitation grants to schools to cover the sum of per-student costs other than teacher salaries.

Enacting UPE in Uganda: situated, professional, material and external contexts

Situated context. At first sight, Uganda appears to have made considerable progress toward enrolling children into primary education (and reaching gender parity in primary provision). According to the MoES, primary enrolment rates increased significantly from almost 3 million in 1996 to 8 million in 2015 (MoES Uganda 2017). The latest figures from the World Bank further reveal that 84% of the children are currently enrolled in primary education.[12] As far as gender equality is concerned, the enrolment of girls slightly outnumbered those of boys with, 4,122,443 (50%) of boys and 4,121,654 (50%) of girls enrolled in school in 2015/16 (MoES Uganda 2017, 16). Besides, upon the implementation of a Schools' Facilities Grant the GoU reported that by 2008 almost two new classrooms were added in each parish district (Penny et al. 2008, 277).

While these numbers suggest some improvement, several forms of inequalities continue to persist in the Ugandan education system if one considers de-facto completion rates and quality of education. As for the former, following the UNDP-Human Development Index (2018), Uganda displays one of the highest school dropout rates

worldwide at primary level with 65%.[13] Moreover, 33% of girls and 34% of boys age 6–9 never attend school and absenteeism rates among teachers and students are extremely high (MoES Uganda 2013). Broadening the base of primary education had a detrimental impact on its quality and did not yield the desired results in regard to completion rates and educational attainment. There was widespread consensus among interviewees that the quality of education varies tremendously by school affecting equal opportunities for poorer societal segments. As stated by one interviewee:

> *If you are poor and from a remote village, you are lucky if you can afford sending your child to the nearest village school. If you are financially a bit better off, you will try to send your child to a school in a city. If you are wealthy you send your child to school in Kampala. If you are rich, you will send your child abroad (Local academic, March 2015).*

The distinction between 'higher standard' and 'lower standard' schools is very common in Uganda, depending on the quality of teachers, general infrastructure, instruction materials or the overall condition and environment of the school. Uganda has 'government funded schools' and 'government grant aided schools' (MoES Uganda 2008). The latter refers to a school not funded by the government but which receives statutory grants in the form of aid from the GoU and is jointly managed by a foundation body and the GoU. This led to a legal structure in the educational system in which public schools are heavily subsidised by foundation bodies. Even if a school is considered as public and receives some support from the government, the school is managed by a foundation body, which according to the Education Act (2008) can entail an individual, group or organisation. Consequently, the quality and services provided of a public or private school in Uganda depend heavily on the funds, management and engagement by their respective foundation body but also parents and community.

At the time of writing 64% of all primary schools were government-led, alongside 36% of the schools belonging to the private sector (MoES Uganda 2017, 3). Nationally, the rapid increase of private schools, in particular, low-cost private schooling or PPPs, led to immense criticism from local CSOs (ISER 2016). Whereas the quality of schooling is much better in expensive private schools this is rarely the case for low-cost private schools which tend to compromise quality for profit (ISER 2016). For Mwesigwa (2015), this public-private divide has created a huge knowledge gap between children of the 'haves', studying in high-quality private schools, and those of the 'have-nots', in government or low-cost private schools. As a consequence, FENU (Forum for Education NGOs in Uganda), which is comprised of over 100 CSOs and CBOs, launched a public education campaign in 2012, calling for action by the GoU to prioritise public education over public-private partnerships, and private education.[14] The same recommendation was also made by the Initiative for Social and Economic Rights in Uganda (ISER 2016).

Professional context. According to the latest Uganda Service Delivery Indicators (SDI) based on independent surveys of 5,300 teachers in 400 public primary schools, only one in five teachers (19%) showed mastery of the curriculum they taught.[15] Following the latest Uwezo (2015) report on learning outcomes in Uganda, among pupils in (primary) P3 – P7, just three out of ten (32%) can read a P2 story and do a P2 division. Besides, among pupils in P3, only 13% have P2 level English literacy and numeracy skills. In addition, only 10% of the pupils in P3 can read a P2 level local language story and in P7, the figure is still not

higher than 31% (Uwezo 2015, 11). Students in low fee private schools have a slight advantage but learning outcomes are still shockingly low with only 31% of the children in P3 who are able to read a story in English, alongside only 36% of being capable to perform division (Uwezo 2015, 35). This points to a clear lack of qualified teachers in Uganda. Even teachers themselves have described the preparatory training as 'severely inadequate' (Altinyelken 2010). Interviews with teachers and the UTU (Ugandan Teachers' Union) further revealed that teacher morale can be low due to meagre salaries and irregular payment. Also, parents have had reservations in relation to the quality of education provided through UPE, particularly in relation to monitoring and incentivising teachers (Higgins and Rwanyange 2005, 14–15). All these factors contribute to low esteem for the teaching profession in Uganda.

A Ugandan education expert further noted:

> There are also issues of absenteeism. In cases of teacher and pupil absenteeism you find that they are unable to complete the syllabus on time and that greatly affects quality. [...] Overall in those primary schools it comes down to the issue of financing for public education. Looking at the payment of teachers in schools and the bad structures it goes back to how much the government is putting in. If what the government is putting in is little you find that the arm of monitoring and evaluation is also going to be affected so, they cannot move around the country to monitor to ensure that the schools comply with the minimum human rights standards. (Local education expert of a Ugandan Think Tank, February 2017).

Material context. Studies have attributed poor school attendance and high dropout rates to long distance to and from schools, cost of education for parents beyond tuition, and the fact that children below age 8 are still considered too young to start school by some sections of society in Uganda (UBOS 2012). Following the latest data extracted from the MoES, the average pupil classroom ratio in primary schools in Uganda was 63 in 2015 (MoES Uganda 2017, 26). Also, student-teacher ratios vary widely across districts and across schools despite national norms on teacher deployment. The average pupil number per textbook in primary education amounts to 2.9 (reading) and 3.1 (mathematics) pupils. During interviews with the MoES, school officials and civil society actors (interviews held in 2015), the following material challenges were identified:

- Curriculum reform did not go hand in hand with the development and dissemination of instruction materials;
- Many schools still lack access to safe water;
- In many schools, there are no latrines for girls;
- Food shortage;
- Sanitary pads for girls (so that they do not have to miss school once a month)

One interviewee also referred to the urban-rural divide in education:

> We want our children to measure up like the children in Kampala, Busoga etc. academically. We can only achieve that when our teachers are very well motivated. At the moment we have a problem of teachers' housing in schools so you find that teachers are using classrooms to accommodate themselves, you find that children are studying under the tree because we are improvising a classroom for three teachers to share and these teachers cannot come with their families to stay in those bad conditions. (Education Officer, March 2017)

External context. Uganda remains highly dependent on external development assistance; more than 40 development partners or donors provide financial support to the country. Accordingly, interviews with senior officials at the MoES and NCDC revealed that the line between externally driven funding allocations for specific areas and policy formula on can be very close. Out of the USD 1.669.6 billion of Overseas Development Aid (ODA), in total USD 99.7 million (6%) were allocated for education in 2012–13. Notably, funding for education decreased from USD 312.4 million in 2009 to 99.7 million in 2013,[16] however, Uganda joined the Global Partnership for Education (GPE) in 2011. Thus far, Uganda has received grants from the GPE totalling USD 100 million. In 2014 *Transparency International* ranked Uganda's public sector as the most corrupt in the world. With regards to education, the Ugandan Teachers' Union (UTU) openly claims that most funds disappear at the very top level within the MoES (Interview with UTU, February 2015).

Overall, primary education takes the largest share of government spending on education (MoES Uganda 2015),[17] yet contradictory statements were made by interviewees, when asked whether funds for education are distributed evenly among regions. Currently, funds are transferred through capitation grants to schools covering the sum of per-student costs other than teacher salaries.[18] In practice, this translates into poorer districts receiving less funding if the population density is also lower, and wealthier districts with a higher population density receiving more resources. This, in part, explains why some regions, such as Karamoja,[19] which is historically the most impoverished (due to colonisation and subsequent conflicts) and least populated region in Uganda, are still severely disadvantaged when it comes to government allocations in education. In addition, the head of the UNICEF regional office in Karamoja stated that once UPE grants to schools have been allocated, more children enrol in school at a later date – leading to additional costs which are not accounted for (interview held in March 2015).[20] A different way of allocating funds, as was argued during several interviews, could be to align the resources available with the multidimensional poverty index of a region, thereby taking into account the different challenges people are facing.

Mexico

CBE as a Global Education Policy

Competency-based curricular approaches focus on what learners can do with their knowledge in addition to what they know. Often competencies are described as a combination of knowledge, skills and attitudes, and the focus is on observable outcomes which can be measured (Bowden 2004). Competency-based education has its roots in behaviourist traditions popularised in the United States during the 1950s. A new impulse to the *global* popularity of competency-based approaches to education was seen in the 1990s. Around the world, international organisations since scramble to develop their own versions of CBE (Griffith and Lim 2014), which has made CBE a clear example of 'Global Education Policy'. Rapid growth in technology, international competition and new trade agreements, developments that are sometimes described as the transition to the knowledge and information society (Kouwenhoven 2003), sparked an interest in education that focusses on practical competencies and skills, such as the capacity to innovate and adapt (Argüelles 2000). In the context of the concomitant rise of human capital theory, CBE was thus perceived by some to be the approach that

produces the human capital, in the form of knowledge, skills and attitudes of students entering the workforce, which are deemed essential in the twenty-first century to enhance countries' competitive advantage in the global marketplace (Frank Bristow and Patrick 2014; Ananiadou and Claro 2009). As such, CBE is linked to economic growth, an interpretation of CBE most closely associated with the Organisation for Economic Cooperation and Development (OECD), which employs *competencies* as the measure of student academic achievement in the standardised evaluation Program for International Student Assessment (PISA) (OECD 2005). At the same time, CBE is linked to more 'holistic' views of development, such as concerns with citizenship and human rights issues (Keating-Chetwynd 2009), social cohesion and cultural diversity (Opertti and Murueta 2010). This approach is promoted by UNESCO.

At the national level, from the Netherlands to Indonesia to Tanzania, curricula are being reformed on the basis of competencies. Speaking about Mexico, Díaz Barriga Casales argues that 'in practically the entire world, and particularly in our context, there is a euphoria to establish competency-based curricula' (Díaz Barriga Casales 2009, 1). However, while on the one hand, a global converging of competency discourses in education can be witnessed, research also points to the impact of local contexts in producing asymmetrical education practices (Frank Bristow and Patrick 2014).

Political-economy context of education in Mexico

Mexico's approach to poverty and inequality is emblematic of the radical neo-liberal reforms put in place since the mid-1980's, to reduce state intervention in the economy and open domestic markets to foreign competition. The approach was supposed to lead to systematic and major reductions in poverty and inequality. Today, Mexico's economy is one of the most open in the world, and it is the fifteenth biggest economy in the world.[21] Yet is also one of the most unequal countries within the OECD. More than 53 million people live in multidimensional poverty, and while the richest man in the world is from Mexico, 53% of the country lives below the poverty line (Esquivel Hernandez 2015).

Within the context of wider economic reforms, the main goals of Mexican education reforms since the 1990s were to improve quality, equity and relevance, which replaced the prior goals of investment in expanding education and nationalist education for social cohesion (Ornelas 2004). Yet, after 15 years of PISA testing, Mexican students still score low on skill development.

CBE in Mexican education policy

The introduction of competency-based approaches to education in Mexico fitted within the country's aims to insert itself in the global economy. In the 1990s, the Mexican government introduced a labour competency approach to vocational education and training, funded by the World Bank and the Inter-American Development Bank. This approach borrowed heavily on experiences with the National Vocational Qualifications in the UK (de Anda 2011). Over successive years, competency-based curricula were introduced to all levels of education, from preschool to university. The idea of key competencies which was promoted at the global level was reflected in Mexican curricular reforms. In pre-school and secondary education, a competency approach was introduced that focused on the competencies that favour continuous learning. It placed

an emphasis on Spanish and mathematics, but also included competencies that apply to all subjects, such as creativity and intercultural awareness (SEP 2004, 22).

But, despite the enthusiasm for CBE within the national Ministry of Education (MoE), CBE reforms attracted critique from within academia and the dissident Teachers' Union *Coordinadora Nacional de Trabajadores de la Educación* (CNTE).[22] Critics interpreted competencies as narrow behavioural skills, framed by a managerial and neo-behaviourist discourse inspired by neoliberal imaginaries, and they critiqued the role of international actors in Mexican policy. Moreover, research suggests that teachers enacted CBE in heterogeneous ways, for example due to lack of teacher training (Reyes and Pech Campos 2007, 181) and infrastructure (Rothman and Nugroho 2010), or due to confusion about the meaning or how to implement CBE (Diaz-Barriga and Barrón 2014, 64).

In 2007, the last level of education to undergo competency-based reform was primary education. To create a knowledge-based education system 'a comprehensive reform, focused on the adoption of an educational model based on competencies that meets the development needs of Mexico in the twenty-first century' (SEP 2007, 23) was undertaken. In what follows, we specifically discuss how CBE was shaped by different aspects of the context in the different Mexican states of Michoacan and Durango.

Enacting CBE in Mexico: situated, professional, material and external contexts

Situated context. Situated factors that mediated the translation of competency-based education in the Mexican case study are related to the location of the school and student intake. About half of Michoacan's and Durango's schools are located in rural areas. Teachers in both states frequently expressed how they felt that the reform was developed for urban contexts, for example by referring to urban situations more often than rural situations. Moreover, the student intake of rural classrooms was often composed of different ages. The following excerpt from an interview with a rural teacher shows how this affected the translation of CBE in his classroom:

> *I have several years in one group so I cannot make the exercises too easy or too difficult. Competencies do apply here, but it implies much more effort, time and knowledge of the curriculum (Primary school teacher, May 2013).*

The curricular reform also demanded the development of English language skills. However, teachers in rural areas had less access to English teacher training, simply because they were located further away from training centres that are often located in urban areas. They were therefore constricted in their ability to develop English language skills, in comparison to their peers in urban schools. This is yet another contextual factor affecting the enactment of global competency norms differently, leading to different educational outcomes.

Professional context. In the Mexican case, elements of teachers' professional contexts such as their values shaped the way the competency-based reform was enacted. Teacher and staff values were very much shaped by their political education context, which differed in Michoacan and Durango. In Durango, teachers were mainly affiliated to the National Teachers' Union (SNTE), which was aligned to national education policy values. On the other hand, in Michoacan, were mainly affiliated to the dissident

Teachers' Union (CNTE), which heavily opposed the competency reform on the basis that it was founded on neoliberal values, that it was imposed by international organisations and that it did not apply to the Mexican local context. The following quote illustrates this sentiment of rejection of the reform in Michoacan:

> *Mexico looks at other countries were the education system works, and they appropriate it and adopt it in Mexico. It is as if you buy a dress and it is too big and you adjust it so it fit is you well. But it is not a Mexican reform, they implement it but they did not create it, it is a reform that comes from Chile, or Japan (Primary school teacher, February 2013).*

In Durango, although most teachers supported the reform on the basis of their political values, not all did. However, even those teachers that argued that the reform was imposed or that they did not support its inherent neoliberal values, the dominant professional teacher culture in Durango implied that they were less likely to critique or resist national education reforms that their Michoacan peers. These elements of teachers' professional contexts lead to the different enactments of global competency norms *between* the two states.

Material context. While the political contexts of education in Michoacan and Durango differed, the socio-economic imbalance within the states was similar, and this also shaped the enactment of CBE. Its enactment was shaped by the different material contexts, such as available technology and infrastructure. The curricular reform texts stipulated that in the twenty-first century the educational materials necessary for the development of the expected competencies have diversified. For example, the texts asked for school and classroom libraries be used to contribute to the achievement of the reading skills standards, and audio-visual materials and the Internet were to be used to develop digital skills (SEP 2008). However, the enactment of these directives was complicated by the contexts of some schools, mainly in rural schools. For example, many rural teachers, but also some of the peri-urban teachers, did not have Internet access, and some did not have electricity. For these schools, the development of competencies that required the Internet was complicated, as the following quotes illustrate:

> *The textbooks refer to a web page, but we barely have television, let alone Internet (Primary school teacher, May 2013).*

> *We are doing an English project, we've got the material, the yellow books, the ones you see over there, but they come with a cd and well...there's no electricity, so how do we work with them? (Primary school teacher, February 2013)*

The competency-based curriculum also required teachers to develop students' presentation skills, but many rural teachers did not have projectors. The enactment of this competency was thus shaped differently in contexts where teachers had access to projectors, compared to contexts where they did not. For example, one teacher in a rural bilingual school[23] enacted the development of presentation skills by having his students recite from their textbooks, whereas another teacher in an urban school stimulated the use of the online presentation programs, computers and projectors. These examples thus suggest a different contextualisation of the trajectories of the curricular reform depending on material conditions. Based on access to the Internet and technical equipment, CBE was translated into practice differently between as well as

within the states, and, most importantly, these different contexts enabled the development of competencies in students unequally.

External context. The enactment of the curricular reform was also shaped by external elements of the schools' contexts, such as the degree and quality of local education authority support. As discussed above, in Durango a key education actor was the National Teachers' Union (SNTE), which supported the reform, whereas in Michoacan, the dominant dissident teachers' union (CNTE) did not. Both states, the directors of the MoE's education departments of primary education were affiliated to the either union, and so was largely their bureaucracy.

This meant that in Michoacan, teachers were initially prohibited from applying the reform, although later on the use of the reformed textbooks was silently condoned. Much of the MoE staff that was in charge of supporting the curricular reform had not been trained in the new reform. This meant that they did not have in-depth knowledge of the way in which the curriculum reform operationalised competency-based education, or competency-based approaches to education in general, which impacted the ways they were able to assist teachers with the interpretation and enactment of the reform. Teachers in Michoacan also explained they did not receive the new textbooks and curricular documents on time, due to obstruction of the distribution by the dissident teachers' union CNTE, which affected the way they were able to enact the reform.

In Durango, on the other hand, the MoE and teachers' union supported the reform, and this resulted in an emphasis on teacher training and distribution of textbooks and supplies. However, some teachers expressed that despite the political and discursive support of the curricular reform by their supervisors, they experienced a lack of concrete information and practical examples to develop the complex competency methodology in the reform. In interviews, after initial positive representations of the curricular reform, many teachers explained that they were at a loss how to change their teaching practices in ways that the reform demanded.

Many teachers tried to deal with this lack of information by self-study, or by researching possible alternatives to competency-based education. Another effect was that teachers sometimes acquired additional, commercially published textbooks, which were more specific in information on developing competencies in practice. However, this shifted the cost of education resources onto teachers. These examples illustrate how external contextual elements shaped the enactment of CBE differently. Due to external pressures and constraints, CBE was translated into practice differently between as well as within the states, and, most importantly, these different contexts enabled the development of competencies in students unequally.

Concluding discussion

We have illustrated how the enactment of two different GEPs by different actors and at different scales was shaped and challenged by their *situated, professional, material* and *external* contexts. Looking into the situated context: Broadening the base of primary education through UPE in Uganda had a detrimental impact on the quality of education thereby not significantly reducing the country's high school

drop-out rates. In Mexico, the urban bias in the reform reduced its relevance to rural settings. The existence of multi-age classrooms and lack of teacher training further shaped the enactment of the reform differently. Moreover, in both countries, reforms were further impaired by professional contexts. UPE in Uganda suffers from a lack of qualified teaching personnel and adequate teacher training programmes, while in Mexico CBE faced mixed perceptions among teachers based on their teachers' union affiliation. As far as the material context of both GEPs is concerned: Ugandan schools still face severe infrastructure constraints, including the shortage of textbooks, sanitary facilities, electricity, water and food. CBE in Mexico was challenged by a lack of access to the Internet and technical equipment, required to implement the reform. Lastly, external contexts had an influence on both UPE in Uganda and CPE in Mexico. UPE suffers from underfunding, corruption and an unequal national system of funding allocations. In Mexico, the unequal degree and quality of local education authority among regions hampered the reform.

Much of these adverse development effects can be explained by elements of the political and economic contexts in which GPEs are embedded in. For instance, in Uganda, the growing divide between private and public actors in education reinforces a two-tier system where only the wealthy can afford to send their children to expensive but better private schools. In Mexico, the stark division between rural and urban development meant that students in urban areas were generally better able to develop the complex competencies required for the twenty-first century, than those in rural areas.

To conclude, both GEPs (UPE and CBE) intended to reduce inequalities by equipping every individual with (basic) skills. However, our research shows that the contexts in which these reforms were enacted generated unequal outcomes and social divides among the rich and the poor (in Uganda) and the urban and rural population (in Mexico). For international and local education policymakers and development practitioners, it is therefore essential to take these contextual processes of translation and enactment into account when designing GEPs. In addition to detrimental development effects, the failure to respond to these contextual realities and needs, may generate a loss of confidence in universal educational norms.

Notes

1. See: http://www.un.org/sustainabledevelopment/education/, last accessed 13 April 2018.
2. We present the Ugandan case study before the Mexican case, as, chronologically, the UPE strategy is 'older' than CBE. Mexico has accomplished UPE and has now moved on towards the CBE goals.
3. One project was funded by the UNICEF-PBEA (Peacebuilding, Education and Advocacy) program, the other by the European Commission (Marie Skłodowska-Curie Individual Fellowship as part of the Horizon 2020 program) Grant number: 702880.
4. The project was conducted in the context of Rosanne Elisabeth Tromp's PhD research and was funded by the University of East Anglia, School of International Development.
5. Alternative in this case means: schools that argue against government-led reforms, and argue to work with alternative curriculums based on socialist principles. In Michoacan, schools were chosen that are part of the teachers' union CNTE education

project: the holistic schools. In Durango, schools run by the union COCOPO were selected.

6. Durango has historically been governed by the right of centre PRI, and the teacher' union SNTE has dominated local union congress. State actors have generally been supportive of education policies emanating from the national scale. On the other hand, in Michoacan, which was governed from 2002 until 2012 by the left of centre PRD, a majority of state politicians rejected national policies. After the 2012 victory of the right of centre PRI, an increasing number of state politicians supported national policies. However, the dissident teachers' union CNTE has dominated the union congress in Michoacan since the 1980s, which provided them with political power over the Michoacan education policy-making process. This union opposed national policies, on the basis of anti-neoliberal arguments.

7. In Durango, around 70% of the people live in urban areas, similarly to Michoacan. In 2012, the state GDP made up 1.23% of the national total. In 2010, half of the population lived in poverty, of which 10% lived in extreme poverty. This means that one out of every ten people did not have enough income to satisfy at least three basic needs. Two per cent of Durango's population is indigenous (CONEVAL 2012; INEGI 2011; INEGI-SEP 2014). This socio-economic situation is similar to the situation in Michoacan.

8. See: http://www.unesco.org/new/en/education/themes/leading-the-international-agenda/education-for-all/the-efa-movement/jomtien-1990/, last accessed 24 March 2018.

9. See: http://www.unmillenniumproject.org/goals/gti.htm#goal2, last accessed 24 March 2018.

10. See: http://data.uis.unesco.org/, last accessed 20 February 2019.

11. See: https://sustainabledevelopment.un.org/sdg4, last accessed 13 April 2018.

12. See: http://data.worldbank.org/indicator/SE.PRM.NENR, last accessed 26 May 2018.

13. Percentage retrieved from: http://hdr.undp.org/en/countries/profiles/UGA, last accessed 20 February 2019.

14. See: http://fenu.or.ug/about-our-campaign-work/quality-public-education-campaign/, last accessed 26 June 2017.

15. See: http://www.sdindicators.org/sites/sdi/files/SDI_highlights_Uganda.pdf, last accessed 13 April 2018.

16. See: https://data.oecd.org/, last accessed 2 May 2018.

17. No exact numbers are made available in the Education Statistical Abstract (MoES Uganda 2015) or the Background to the Budget of the Fiscal Year 2015/16 (MoFPED 2015) on the amount spent on UPE.

18. Interviews held at MoES with three different staff members on 23 February 2015; 31 March 2015; and 2 April 2015 in Kampala.

19. More information on the specific situation of Karamoja can be found at: Datzberger 2016.

20. Interview held with head of UNICEF in Karamoja, 11 March 2015 in Moroto.

21. See: http://www.imf.org, last accessed 25 April 2018.

22. The CNTE is a teachers' movement within the Mexican National Teachers' Union SNTE. They draw on left-wing and Marxist imaginaries (throwing over State power) and imaginaries of popular democracy, and they challenge the power of the SNTE (Street 2003, 180).

23. In Mexico, these schools pertain to the Spanish-indigenous language bilingual school branch.

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