THE DEVELOPMENT OF SECONDARY SCHOOL EDUCATION IN REVOLUTIONARY CUBA, 1959 - 1991: A WORLD-SYSTEMS APPROACH

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I hereby certify that the work embodied in this thesis is the result of original research and has not been submitted for a higher degree to any other University or Institution.

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December 1998

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Abstract

In 1959 the popular Revolution of national liberation and independence triumphed in Cuba, extended a few years later into a Marxist-Leninist strategy for building socialism and communism on the island. In this radical social and political context, conditions were ripe for a radical alternative approach to secondary school education. This research confirms and extends existing evidence and analyses, showing that the model of secondary schooling established in revolutionary Cuba shared fundamental aspects of dominant models throughout the world. In particular, Cuba's revolutionary schools are shown to have adopted a similar approach to mass education, as an investment in human capital and citizen formation.

In the analysis of this historical phenomenon, a world-systems geocultural approach is used to describe and explain the non-exceptional form and character of Cuba's secondary schools. The approach synthesises world-system level economic and cultural aspects, within the concept of a world-systems 'geoculture' of development, describing how these interrelated influences historically conditioned secondary school education policy and practice in Cuba. This process is traced through the impact of the world-economy, and related world-systems geocultural assumptions and objectives, over the political economy of Cuba's socialist project, with direct implications for secondary school education. The world-system level conditioning influence on school policy and practice is shown to have been mediated by the particular national conditions, such that features specific to Cuba's secondary schools are identified within the broad framework and constraints of the world-system level influence.

The world-systems geocultural approach provides a viable, historical account of secondary school policy and practice in revolutionary Cuba. General continuity is identified, in accordance with the broad, world-system level influence. The historical analysis demonstrates the need for a world-system level approach, and supports the need to include world economic and cultural factors, under the geocultural framework.

Introduction:

The development of secondary school education in revolutionary Cuba, 1959-1991: A world-systems approach

THE CUBAN REVOLUTION

The triumph of the Cuban Revolution in 1959 was the culmination of a popular and broad-based, national liberation, anti-imperialist movement. Within a short time, the political leadership would speak of a socialist Revolution, and Cuba as the first socialist state in the western hemisphere, with a corresponding project for socialist development. The Cuban people would come to represent, at least symbolically, both victors in a long struggle for national independence and sovereignty, and proponents of radical armed struggle for their neighbours and all people of the so called 'third world' against capitalism, imperialism, and underdevelopment. Radical politics and domestic policies resulted, as the leadership sought to articulate and implement an authentically independent and egalitarian program for socialism and communism on the island. Serious and consequential efforts were made to attack unemployment and poverty, and reduce socioeconomic inequality. International interest in Cuba was heightened, particularly in the 1960s given its rejection of capitalism and Old Left real existing socialism.[1] If ever there was a site for a viable alternative to capitalism to be developed, with the popular support and mobilisation of the population for the anti-capitalist, revolutionary Cuba seemed to be it.

Like the broader political and social project, the potential for an authentic revolution in education on the island was also heightened by the historical context. The 'old education' was criticised above all for its selective nature, and education was nationalised and access rapidly universalised across the whole society. As the 'new education' was extended and reconstructed, it was consciously directed towards

[1] Examples of Cuban criticism of the policies and models of both China and the USSR are discussed in chapters I and II. For a general overview see Horowitz (1970). High profile international support for the Cuban Revolution and its humanistic character included French philosopher Jean-Paul Satre (see Sartre 1961). Sartre described Che Guevara, after his death in Bolivia, as "not only an intellectual but the most complete human being of our age" (cited in Anderson 1997, p. 468).

supporting the radical, independent political project. The radical politicisation of public education, amidst the radical politics being expressed by the government, and its support for revolutionary movements in many parts of the world, added to the potential for something unique to emerge, with respect to education in other socialist and non-socialist states in the world.

This context and potential, and the subsequent path of the Cuba's revolutionary and socialist project from 1959 to 1991, provides the background for this research. Over this historical period, a number of distinct periods in the development of the Cuban Revolution, and within these the development of secondary school education, are followed. They include the immediate post-Revolutionary period until 1961; the formal adoption of socialist objectives and attempt to construct an independent model for socialism and communism in the 1960s; the post-1970 period of political and economic institutionalisation and alignment with the USSR through to the mid-1980s; and finally the period of national 'rectification' of these models from 1986 until the imminent collapse of the Soviet Union and East European communism between 1989 and 1991. Over the course of the Cuban Revolution, the domestic and foreign policies of the Communist Party and government have included a consistent public critique of capitalism and imperialism on a global scale, and their implications for underdeveloped Third World states like Cuba. At the same time, policy has shifted in response to domestic and international conditions and pressures.

Thus the context of revolutionary and socialist Cuba, 1959-1991, is a potentially critical site for investigating the impact of capitalist world-system influences over the development of secondary schooling, and the ways in which this influence occurred. A conditioning world-systems geocultural influence is identified, working through and mediated by the revolutionary context. This influence shaped the basic structure, objectives and organisation of secondary schooling, primarily through the overriding push to achieve economic development for the country. This central feature of Cuban policy is linked to the world-systems influence through the country's 'underdevelopment' within the world-economy, and the related geoculture of development reinforcing the concept and objective of national economic development,

and strategies to achieve it. The world-systems approach thus explains the fundamental features of secondary school education policy and practice in revolutionary Cuba.

A brief review of secondary school educational change in revolutionary Cuba follows. This review outlines the main characteristics of secondary school reform, and identifies the main historical problem addressed by this research: how to explain the resulting, historical development, structure, roles and practices of secondary school education in revolutionary Cuba. World-system level approaches to education are subsequently reviewed, after which I outline the case for a world-systems approach in more detail. The approach put forward incorporates economic and geocultural influences within the capitalist world-system impacting on the development of Cuba's secondary schools. Finally, the main arguments of the thesis are summarised, with an overview of their development within subsequent chapters.

REVOLUTION AND CHANGE IN SECONDARY SCHOOL EDUCATION

Some of the most striking features of secondary school education in revolutionary Cuba, both prior to and beyond the official adoption of a socialist course, have been its rapid and massive extension; the equalisation of access; and the official recognition of the social and political role played by the school in society. The government and renovated Ministry of Education observed that the school played an important part in supporting the state and its new revolutionary government, by socialising students as loyal citizens of the Cuban state. Going further, they added that the school would be critical in the preparation of the youth for the new socialist society being built in Cuba, and its program of independent, national, and socialist economic development.[2] Thus in the context of the Revolution, revolutionary change for school education was foreshadowed as it was explicitly politicised, with intended political outcomes for schools incorporated into policy documents and reforms. The school was publicly

[2] One of the best examples of this, prior to Fidel's declaration of the "socialist character" of the Revolution, was the public document issued by the Ministry of Education (1960) entitled *Mensaje Educacional al Pueblo Cubano* ('Educational Message to the People of Cuba'). As will be seen throughout this work, evidence of this type is consistently found in official statements and policy.

acknowledged and defined as a key instrument of the state in its social, political and economic program for the country.

The context of revolution, in conjunction with this early and consistent acknowledgment and conscious intention to politicise school education, opened the possibility for significant and radical change in the field of secondary school education. That is, the potential for a truly unique or exceptional school education emerged, with respect to the dominant models then found throughout the world that involved some level of compulsory age and subject based classes, directed to the provision of basic skills and civic formation seen as required by the modern nation-state. As with historical work on Cuba, scholarship on education under the Revolution ranges from uncritical exhortations of educational achievements under the Revolution, often based around statistics on its expansion (see for example Labarrere Reyes and Valdivia Pairol 1988; Castro 1975a; MINED 1968d; Kolésnikov 1983) to assessments premised on negative appraisals of educational outcomes and methods (for example Bunck 1994).[3] A limited range of literature broadly sympathetic to the Cuban educational project, but critical of different aspects of its development in a more constructive way, is also drawn on in this research.[4]

Some of the more recent work includes Lutjens (1996) text which provides a favourable assessment of Cuba's system of Popular Power (*Poder Poplar*) and its democratic potential and practice. Lutjens (1996) focuses primarily on broader questions of democracy, participation and power in Cuba, but in this context concludes that the expansion and equalised access to technical education in Cuba acted to constrain the emergence of a Soviet style technocratic elite. She adds that inequalities in terms of educational credentials were weakened due to the multiple pathways to

[3] Statements, reports and other documents from the Ministry of Education, not attributed to a particular author or group of authors, but clearly published in the name of the Ministry, are referenced using 'MINED' (Ministry of Education – *Ministerio de Educación*) as their author, and sorted by year.

[4] Lutjens (1998) also has made a recent essay review of literature dealing with education under the Cuban Revolution. Most of the texts referred to in this review, relevant to secondary school education, have been consulted in this research.

university education and the 'combination of work-study'. For Lutjens (1996) the context of socialist Cuba, and specifically *poder popular*, made the selection and differentiation processes of education in Cuba qualitatively different from that in capitalist society.

Carnoy (1990) offers an historical account of the 'conditioned capitalist' Cuban state, and similarly evaluates the educational reforms in the context of the equalised income and consumption, and socialist relations of production and ideology. Thus, acknowledging that education continued to provide differential status and wages, Carnoy notes the reduced consequences of these in the historical context. He also notes that school education was directed towards imparting skills, attitudes and political consciousness in students so as to improve their eventual productivity in work, and contribute to the development of the nation. The creation of the elite, selective preuniversity schools is presented in the context of a shift from political consciousness towards economic efficiency. In both cases scarce attention is given to explaining how, and why such a shift occurred, other than by reference to the domestic political and economic situation.

Other analyses have well documented the expansion of school education under the Revolution, citing enrolment figures, student-teacher ratios, government spending on education as a proportion of GDP and other such measures (see for example Fitzgerald 1990; Leiner 1985; Paulston 1971; Bowles 1969; Dore 1976). Viewing this expansion favourably, particularly in comparison with other Latin American states, some accounts have identified problems in the type of school created. Bowles (1969), for example, notes the ongoing importance of exams and grades to motivate students. Dore (1976) similarly notes the emphasis on providing technical skills ahead of political consciousness, and that in retaining the selective function the new schools reinforced old social patterns (pp. 109-11). Leiner (1985) also cites an ongoing reliance on achievement testing, and the problem of elite, selective schools contradicting the official egalitarian goals. Finally, Padula and Smith (1988) acknowledge that the expansion was "one of the most extraordinary efforts in the history of education" (p. 135), but suggest serious problems and uneven results in the goals of inculcating Marxist ideology and using education to support economic development (pp. 135-37).

The common features emerging from these and other studies of education in Cuba, relevant to this research, are agreement on the expansion of state provided school education under the Revolution; identification of an attempt to use schools for national political and economic development objectives; and some acknowledgment that despite the political rhetoric, the structure of the model of the new schools and their functioning in society had not radically changed.

These main tendencies are examined and confirmed by this research, being identified consistently over the historical period, with the political and economic objectives for the new schools clearly converging and dominating in policy statements for secondary schools. The first of two main trends, identified early in the process of school educational reform in the revolutionary society, I refer to as 'national political objectives'. This trend covers reforms and objectives in secondary schools, explicitly designed for the socialist political education and formation of students. These include: the introduction of new political subjects, for example 'Fundamentals of Marxism-Leninism'; the reform of the content of existing subjects to support the socialist politics-ideology; the incorporation of manual work as a component of students' general education; the mobilisation of students into politicised student organisations and their participation in national economic tasks such as sugar or coffee harvests; and in organisational terms, the politicisation of the Ministry of Education as a branch of the socialist state apparatus, and role of the Communist Party in the administration of schools. Reforms and school objectives in this area were intended primarily to socialise students into the ongoing project of a transition to socialism (and communism), promoting support for the government and its policies and the role of students within this project. This trend also included the general expansion and equalised access to secondary school education, which was motivated by both socialist political principles of equality, and the potential for socialising the majority into support for the political project via state run education.

A second tendency in secondary school reform under the Revolution is identified and dealt with under the heading of 'national economic development objectives'. These can be characterised as policies and goals designed to directly and indirectly assist the underlying and expressed project of national economic development. Examples of

reforms and policy objectives in this area include: mobilising students for work in productive activities of national importance; the creation of academic and vocational pathways within the upper secondary school level and selection processes for these, in accordance with identified economic plans and objectives; the 'specialisation' of vocational training within this level; the application of work-study; and multiple, broad objectives stressing desired (disciplined) behaviours, values and attitudes towards work. These reforms and objectives were consistently based in the idea of school education directly contributing to the planned program of national economic development, primarily through the general preparation of all students for work, by providing basic skills and socialisation of students, followed by specific academic or vocational training.

As is apparent in these broad categorisations of educational change, there is significant overlap in the specific and general policies and educational objectives. As is developed in the section on *World-systems approaches to education* below and throughout the research, the socialist and communist political objectives converged with the political program for national industrialisation, growth and economic development. The conception and pursuit of 'progress' and 'development' were such a part of the official socialist project, that school education was seen from the beginning, I argue, as a key state institution capable of contributing to this fundamental objective of the socialist and revolutionary project (see Blanco 1995; Castro 1991). Approaching it another way, the intended functional or instrumental role for secondary schools, as an efficient means of selecting and preparing the future labour force in accordance with identified needs, was politicised by the centrality of development objectives within Cuban socialism.

Large responsibilities and expectations were clearly placed on the new schools. They were to play a crucial role in socialising new generations of socialist citizens, accepting and participating in socialist Cuba's new forms of socioeconomic, cultural and political organisation. At the same time, they were to prepare the work force required for the requisite national economic development, providing technical skills and capability, loyalty to the socialist political project, and appropriate values and attitudes towards work. In the process of pursuing these objectives, the secondary schools established in Cuba closely resembled those in other socialist and non-socialist states, in terms of their

basic structure and forms of organisation, teaching methods, selection and differential allocation of students, and ultimately their underlying roles and objectives in society. In addition, this similarity, and the presence of these two main tendencies, were continuous throughout the thirty year revolutionary period under study and reinforced over time, yet seemingly unaffected by specific domestic political and economic shifts.

THE HISTORICAL PROBLEM WITH SECONDARY SCHOOL EDUCATION IN CUBA

Continuity, rather than change, was a distinctive feature of secondary school educational reform in revolutionary Cuba. Clearly, in making this claim I am not attempting to deny the real and consequential change in relation to the massive expansion of school education under the Revolution. Education budgets reached a level of around seven percent of GDP by the mid-1960s and were sustained at this level (see Epstein, 1988). Emergency plans were implemented to build schools and train teachers, alongside measures to ensure that no students were disadvantaged in terms of access to school. These achievements have been well documented in Cuban and foreign publications. Continuity did occur, however, at the level of these basic objectives of secondary school education: to socialise citizens of the (socialist) state and prepare these citizens for political and working life. Thus at this broad level, the perceived social and economic functions of the school were essentially unchanged.

Similarly, in more specific terms, schools established and maintained structures and features common to public school systems across the globe. In general terms this involved three years of basic (and over time compulsory) common secondary schooling, organised around age and subject based classes, in traditional subject disciplines, with specialist teachers facilitating students' assimilation of content knowledge that was ultimately assessed in formal examinations. Grades were awarded to determine promotion from one year to the next, and ultimately to select students for post-basic secondary options. At this level, conventional structures of either ongoing academic preparation (preuniversity), or an alternative specialised form of vocational training, was established, with competitive entry into the higher status, academic track. The selection and specialisation of students' training was justified in terms of efficiency and

meritocracy, and increasingly the underlying goal of most efficiently and effectively preparing labour for hierarchical positions within the national economy.

Accounting for how and why this continuity occurred, and why given the radical political context, Cuba did not produce something more exceptional in secondary school education, emerges as a historical problem that has been inadequately addressed in existing work. At different points in the history of the Cuban Revolution, indications have emerged from within Cuba of serious and long-standing problems with respect to the achievement of the official, socialist and economic objectives of education. Most recently however, a high level *Parliamentary Commission on Education, Culture and Science* held in Havana in April of 1995, went further and identified the similarity of schools with those in capitalist countries as a potential source of problems in contemporary youth values.[5] Critically, in a submission to the Commission, former Dean of Teacher Education Juan Marí-Lois (1995) acknowledged this similarity in the fundamental objectives and processes of Cuba's socialist schools:

> A scientific conception of the world, a willingness to accept discipline without question, the capacity to work efficiently, and the acceptance of the principle to concern oneself only with one's immediate surroundings [taught in Cuba], could be the characteristic behaviours and attitudes inculcated in any capitalist country (p. 8).

Marí-Lois (1995) cited the uncritical importation of the Soviet educational model in which, contrary to the expressed socialist political objectives, students came to view success not in terms of the collective socialist project, but rather "the vertical ascent towards higher positions within the hierarchy and organs of power" (p. 8).

[5] Initial reporting on the *Parliamentary Commission of Education, Culture and Science* in the Cuban media, held while the author was in Cuba, referred to a "crisis of values," with some strong public criticism of particular practices in schools. Closed meeting were held in schools and the Ministry of Education in the province of Havana to discuss the Commission's findings, but no public information has emerged from the Ministry about the Commission and its implications for educational policy.

The implications of such internal evaluations for the historical review are significant. After thirty five years of conscious and expressed efforts to build a new type of school and public education, directed to the communist political formation of students and converting Marxist-Leninist ideology into personal convictions, major problems clearly remained.[6] Further, the schools built to achieve these radical political goals, in appearance and practice, were acknowledged as resembling those of 'any capitalist country'. Reforms of policy, curriculum content and practice, had unquestionably taken place as schools took on a new role and character within the socialist state, and the broad socialist project of the revolutionary government. The new content and socialist political objectives were, however, incorporated into an orthodox model of schooling, for example as new subjects to be learned, like others, for evaluation in formal exams. Thus for example, secondary accounts like that of Bowles (1969) observed that teaching practice generally involved a "catechistic, authoritarian, teacher-centred approach characterised by a single teacher talking at a class of passive students" (p. 110). Dore (1976) would later add that the project of forming the new socialist citizen was being attempted through "learning doctrine from textbooks" (p. 109), whilst Padula and Smith (1988) asserted that "Some educators argue that in Cuba, as in eastern Europe, the teaching of Marxism has become an empty exercise" (p. 135).

Other signs that the radical rhetoric and politicised socialist objectives for secondary schools in Cuba had not radically changed their structure, basic functions or practice, consistently emerge in the literature and historical documents. For example, in 1971 the National Congress on Education and Culture discussed some 7847 recommendations to improve school education, indicative of a perception within Cuba that at the close of the first decade much more change was required for schools to effectively form the new socialist citizens (see MINED 1971a). The subsequent plan for the 'improvement' (*perfeccionamiento*) of school education for the late 1970s reformed the national system in line with Soviet models, further reinforcing the goal of preparing labour as part of

[6] In a recent expression of these objectives, The Ministry of Education cited the "formation of revolutionary convictions in students" as a fundamental objective of school education (MINED 1995b, p. 2).

students' political formation, and associated measures for student competition and selection, differential training, and the conventional nature of Cuban schools. Into the 1980s, under the 'rectification campaign,' education was targeted as part of the official push to reinvoke the more radical, revolutionary ideals of Che Guevara, and move away from the Soviet models by emphasising appeals to citizens' socialist consciousness and morals to stimulate work.[7] The associated critique of schools identified an overemphasis on final exams (*finalismo*); the inadequate preparation of students due to their being pushed through earlier exams (*promocionismo*); and students being encouraged to uncritically memorise content (Padula and Smith 1988, pp. 133-34). Lutjens (1996) adds that "traits of formalism, rigidity, and authoritarianism" were raised and criticised.

On this basis, the work that follows clearly establishes and confirms the argument that secondary schools in revolutionary Cuba did not radically change as a result of the Cuban Revolution, and its domestic program for building socialism and communism. Nor did they radically change in response to the associated official policy objective of forming new socialist and communist citizens in the schools. Taking the argument further, I assert that the schools continued to be seen primarily as institutions for preparing students for work, in the interests of broader national economic development goals and plans. Partly as a result of this, they relied on conventional structures and methods to pursue both these and the new socialist political goals. The critical question for Cuban education thus emerges as why the conventional model of secondary schooling was established and compounded over thirty years of Revolution.

To address this question, I have indicated some of the approaches to the historical record on Cuba's secondary schools that follow in the research. These include the analysis of:

1. the historical context and political economy of the Cuban Revolution and its impact on school policy;

[7] For a critical analysis of this process, and the pragmatic basis of the "rectification of errors and negative tendencies" amidst ensuing economic problems and high levels of worker indiscipline, absenteeism, foot-dragging and other forms of indirect resistance, see Eckstein (1994).

2. the specific national political and national economic development objectives found in formal policy for and conceptions of secondary schools; and
3. how these objectives were pursued within the policies, structures, organisation and practice of the secondary schools.

This level of analysis broadly characterises secondary schooling, finding evidence of these two main features of reform and their continuity over time, and making some connection between these and the national political economy of the Revolution. The question emerges whether this level of analysis, focusing on national economic and political conditions, is sufficient to account for the identified similarity of the Cuban schools with those in very different political and socioeconomic contexts. Further, if national economic problems took pragmatic precedence over radical political goals, as persuasively argued by Eckstein (1994) for example, can these alone adequately explain the specific secondary school model established, given the connection between the national and world economy?

This research argues in favour of moving beyond the scope of the national political economy, as a means of explaining the determinants of and influences on public policy. To understand how and why schools were based on the main objectives of socialist (citizenship) political formation, and contributing to national economic development; and why a conventional model of secondary school was established and consolidated to achieve them, I argue that influences beyond national boundaries need to be included. That is, there is a need to go beyond the acceptance of policy at face value, and identify external, world-system level influences shaping and impacting on the national context, and the development of secondary schools.

By developing a world-systems approach to the historical study of secondary schooling, and identifying evidence of a world-systems influence conditioning national policy, the case is made for a world-system level approach to better explain the processes and influences shaping the development of Cuba's schools. Thus the research sets out an argument in which world-systems economic and geocultural influences shaped the objectives of school education under the Revolution, in part by shaping the objectives of the socialist project itself, with implications for school structures and practice. In addition, these influences impacted directly on schools, as shared geocultural conceptions about their social role, structure and organisation were

incorporated into Cuban policy. Finally, the influence of the capitalist world-economy on the island, and directly on secondary school education, is put forward as essential to the historical explanation, for providing both a general analysis of educational expansion, and a more detailed account of specific reforms and practices established in secondary schools.

A WORLD-SYSTEMS APPROACH TO NATIONAL, REVOLUTIONARY, SCHOOL EDUCATION

World-systems approaches to education

Approaches to the analysis of education systems that consciously use a world-system level or global perspective to account for some aspect(s) of their form and / or development, are largely situated within the field of comparative education. That is, in linking national education systems to influences and causal factors beyond national boundaries, such an approach may compare systems between nation-states as part of the search for evidence of cross-national or global influences. By definition, such approaches support the argument that national historical conditions, and their socioeconomic and political processes, are insufficient to explain the creation and spread of mass school education. In turn, they include world-system level processes and influences impacting on the nation-state, to help explain why particular forms of school institutions, their organisation, and the premises on which they were constructed, emerged in various specific national contexts.

Whilst work within the broad field is limited (see for example Arnove 1982), different emphases or perspectives within world-system level approaches to school education are evident in existing literature. These are addressed in terms of two main issues or debates. Firstly, 'world culture' perspectives are reviewed, alongside broader perspectives that include an influence for the world-economy. Within this debate, consideration is given to the equilibrium (functional) or conflict character of the explanatory perspectives, but the key issue within these is related to the question of cultural and / or economic influence. I then argue for a world-systems approach in which the world cultural perspectives on school education are joined with Wallerstein's (1998; 1995a; 1992b; 1991a; 1984; 1983a; 1979) approach to world-systems analysis,

linking the capitalist world-economy with a hegemonic world-system level 'geoculture' of development. Secondly, the issue of the role of specific, national events and influences within a world-systems approach is discussed. This is done in terms of their being conditioned or constrained, rather than determined, by the broader world-system, and impacting of the interpretation and articulation of world-systems influences in the national context.

Following this, the methods used for the historical research are outlined, including work carried out in Cuba over fifteen months. The need for a broad world-systems approach to account for the historical development of secondary schools in Cuba is outlined. This is followed by some elaboration of the approach used, after which the main arguments of the research are set out. Specific reference is made to the combination of economic and geocultural influences within the world-system, and the value of this approach for explaining the historical development of secondary schools in revolutionary Cuba.

World culture / polity and (capitalist) world economic perspectives

A major line of research within the world-system level perspective can be broadly termed the 'world culture' or 'world polity' approach (see for example Boli, Ramirez, and Meyer 1985; Boli and Ramirez 1986; Meyer 1980, 1994; Meyer et al. 1997; Meyer and Hannan 1979; Ramirez and Boli 1987). This approach argues that the spread of "homogenous mass education [systems]" (Boli, Ramirez, and Meyer 1985, p. 151) across national boundaries, with very different socioeconomic and political contexts, is primarily a result of a world culture or polity influencing the creation and adoption of similar institutional forms across the globe. Within this model, mass school education is universally constructed as a right and duty of citizens, and is central to the process of nation-state formation, by creating members or citizens of the nation-state (Boli, Ramirez, and Meyer 1985; Ramirez and Boli 1987). Conceptions of and about institutions like schools are incorporated in all parts of the world largely without question, under "a common global social system" (Boli, Ramirez, and Meyer 1985, p. 156). Focusing on the general process and aspects of modern state formation within the world-system, Meyer et al. (1997) add that "functional justifications of schooling are rarely questioned," regardless of evidence contradicting them (p. 149). In summary, the

world culture perspective views the spread of mass school education as a part of the spread across the world of modern state forms and state institutions, based on world level cultural assumptions about these institutions, including their function of creating members of the modern state.

The emphasis of this perspective on a world polity, with institutional rules, values and "ideological elements" (Ramirez and Boli 1987, p. 150) provoking and then shaping the expansion of mass education within nation-states, discounts the role of national or world economic factors in accounting for the universal spread of mass school education. This argument is based on research in contemporary history showing very similar trends in terms of expanded school enrolments, across regions with very different levels of "industrialization, urbanization, and other characteristics" (see Ramirez and Boli 1987, p. 159). Thus the world cultural system approach sets itself apart from the economic, structural-functionalist theories, by its focus on world cultural rather than national or world economic functions of and causes for educational expansion and development. For the purposes of this research, this point of differentiation is most significant, although Ginsburg et al's (1990; 1991) description of the world culture argument as an example of a world-system level equilibrium approach, should be noted. Under their critique, the world culture approach is a model of educational development and change within national systems that responds, in a mechanical or functional way and without significant conflict, to the prescriptions within the world culture.

The alternative approach advanced by Ginsburg et al. (1990), described as a 'world-system level conflict approach' to educational reform, is in contrast with the world culture perspective and incorporates aspects of the world culture framework in a less stable or functional framework. More importantly, the Ginsburg et al. (1990) model adds the need to focus on the location of the nation-state within the hierarchy of the capitalist world-economy, consequently highlighting the associated conflict between and within states involved in this inherently unequal form of economic organisation. In particular, conflict emerges from peripheral states' exploitation by the centre, and the implications of a state's economic location for its national production and economic development. This in turn has consequences for internal or national conflict and struggle. In this sense, the point of distinction with respect to the issue of conflict is

closely tied to the role given to world economic conditions, processes and constraints. Thus for example, where both views see international non-governmental organisations and other international agencies as world-system level influences shaping national systems, the conflict approach highlights the economic interests represented by organisations like the World Bank, IMF, multinational corporations and other United Nations bodies (see especially Boli and Thomas 1997; and Ginsburg et al. 1990, pp. 486-89).

This distinction is well illustrated in the assertion of Boli and Thomas (1997), that the world culture perpetuates the idea that "Mass schooling is necessary for national [social and economic] development; therefore, Malaysia and Paraguay must have schools" (p. 173). Here they note that the content of world culture, of which this assumption about mass schooling is one example, can be "inferred from the characteristics and operations of INGOs" (p. 180). They clearly recognise then the influence of the concept of mass schooling as necessary for development, but attribute this almost exclusively to world culture, rather than the economic interests implicit within such a conception. Ginsburg et al. (1990), on the other hand, affirm that such institutions carry "economic, political, and military power," and that while educational reform is not simply an automatic, "functional response to the needs of economic elites or of the world capitalist system" as they might be expressed through these institutions, these interests dialectically condition and shape national reform (p. 488).

The point here I am making here, and develop in this research, is to acknowledge and support the need, highlighted by Ginsburg et al. (1990), to include world economic processes, structures and forms of organisation in the analysis of world-system level influences on national educational development and reform. That is, by highlighting the lack of attention given to conflict by world culture approaches, particularly between nation-states and international or global level cultural and economic influences, Ginsburg et al. (1990) lead the way towards a more comprehensive perspective that combines world-system level economic with world cultural influences. Implicit in this argument is the assertion that world economic and cultural influences or processes cannot be feasibly separated, with aspects of a global culture emerging from, and in turn impacting on, the capitalist world-economy.

Some indication of this compatibility, or at least the inability to neatly separate such issues, comes from work within the world culture approach. For example, while Ramirez and Rubinson (1979) argue for national educational expansion in terms of world cultural ideas of schooling as an aspect of citizenship, creating members of the nation-state, they acknowledge a role played by education "legitimating the economic and political allocation of individuals in society" (p. 79). Most distinctively, however, many world cultural accounts indirectly include world and national economic factors in the expansion of school education, acknowledging the shared cultural belief or conception across the world-system that education would contribute to national economic development. Meyer et al. (1997), for example, note the prevalence of this belief as a factor behind the expansion of national systems, despite that fact that "careful studies of, for example, education's effects on economic growth suggest that this functional relationship is at best weak and highly conditional" (p. 149). Ramirez and Boli (1987) similarly note a generalised belief in the idea that "education has been a key factor in national … [social and economic] … development" (p. 156).

Taking this further, the whole process of the expansion of mass school education in nation-states is presented as taking place in the context of "the world polity's myth of progress" (Ramirez and Boli 1987, p. 155). That is, the national development beliefs about and contributing causes for the spread of mass schooling stem from a world culture that includes, for nation-states, "such self-evident goals as socioeconomic development" (Meyer et al. 1997, p. 160). In this approach modern ideas about and models for school education, and its roles and functions in society, are implicitly linked to national economic goals which, in turn, cannot be isolated from the capitalist world-economy.[8] Despite these identified links to ideas and objectives related to the economy, the world culture or world polity approach to the expansion of mass education generally excludes economic analysis, be on a national or world level.

[8] The stress here is on capitalism as a world system of competitive, national, production and trade on a world market for maximum profit and accumulation of capital, not capitalist relations of production within a particular nation-state.

Moreover, in support of the general approach being outlined here, combining world economic and cultural influences, Arnove's (1982) overview of world-systems perspectives for comparative education makes no distinction between equilibrium and conflict, or cultural and economic approaches. Instead, while recognising the need for more research in the field, he implicitly synthesises the components of the world-system level perspectives. This is done by acknowledging first that the world economy affects the national conditions of economic growth, and the associated types of jobs available, with an impact on education; and secondly the (cultural) idea within the nation-state that education leads to improved social status. This second feature is linked to a seemingly world cultural approach whereby 'third world' countries model their systems on those in core countries as part of a human capital strategy for national development. This 'borrowing' of cultural ideas and conceptions by a nation-state, as part of a strategy to overcome its economic situation that is based in the hierarchical location of the state within the capitalist world economy, highlights one aspect of a synthesised approach.

A capitalist world-system geocultural approach to school education

Consequently, the world-systems approach used in this research draws extensively from the world-systems analysis of Wallerstein, but in a way that argues for the inclusion and compatibility of features of the world culture approaches as linked to and part of a geoculture of development within the modern world-system. Fundamental to the approach is the interpretation of socialist states as remaining within, and functional to, the capitalist world-system. In this view, the coming to power of communist movements provides stability for the world-system, via their pursuit of a "mercantilist strategy of "catching up" and "surpassing" rival states" (Wallerstein 1984, p. 89), thus maintaining relative peace and stability in their sphere of influence within the interstate system. This said, Wallerstein (1979; 1995a) acknowledges "real differences" between the projects of the so-called socialist and non-socialist states, particularly the consequential impact of states like the USSR and Cuba in terms of legitimising revolutionary struggle; pressuring for and producing welfare reforms in the core; and challenging the legitimacy of the capitalist world-system (pp. 110 & 239).

The critical aspect of the approach for the analysis of education is not so much the characterisation of socialist states as contributing to the stability of the world-system,

but the sharing of many features and characteristics with other socialist and non-socialist states within the world-system, which have consequences for the development school education. This is based in Wallerstein's (1995a) concept of 'liberalism' as the dominant ideology of the world-system, and the argument that the 'socialist states' and their expressed Marxist-Leninist projects, rather than being in conflict with liberalism became in practice "one of its avatars" (p. 89). In summary, the argument is that socialist states like Cuba, asserting adherence to Marxism-Leninism, shared the general worldview of liberalism that included:

1. the goal of achieving state power coupled with the principle of self-determination for sovereign states;
2. full membership and participation in the interstate system;
3. the state objective of national development, aimed at catching up to more developed core states and achieving modernisation; and
4. the belief that this development, and progress, was possible through the application of a rational and state planned development strategy.

These common assumptions and objectives of socialist and non-socialist states, within the capitalist world-system, are described by Wallerstein (1995a) who emphasises that "both conservatives and socialists accepted the world-scale liberal agenda of self-determination (also called national liberation) and economic development (sometimes called construction of socialism) (p. 103). On this basis, he concludes that "the essential dispute between them was merely about the path to such national development" (p. 109).

Thus the socialist states' official programs of Marxism-Leninism, acted as a variation of liberalism, in the sense that they accepted its major premises about states; their sovereignty, development and progress; and ultimately the pursuit of fundamentally similar objectives of achieving an improved share of surplus and level of consumption for the state, within the capitalist world-system. Wallerstein's (1995a) concept of a "geoculture of development" (p. 166), by which the belief in the possibility of national economic development for all states became the "geocultural underpinning of the world-system" (p. 163), is critical to this synthesised world-system approach to education. Through this concept, world cultural aspects like the belief in the necessity and possibility of national development, understandings of what constituted

development, progress, and modernisation, and the role of the state and state institutions in achieving these, are understood through their connection with the capitalist world-economy. That is, through the hierarchical organisation of states in the single world-economy, the reinforcement of the development imperative through their location in this economy, and the hegemonic models of modern and developed states and economies to which all states aspired.

Thus by approaching Cuban schools through this perspective of a dominant ideology of liberalism, and a shared geoculture of development, world-system level economic and cultural influences over the development of secondary school education are identified in an integrated way. The political project of the state is seen as being influenced by both the underdevelopment of the country through its location in the world-economy, and the associated influence of liberalism and the geoculture of development. The subsequent shaping of the national project in terms of catch up development and progress for the sovereign state, reinforced the role of economic development objectives in the expansion of school education. Similarly, drawing on world culture arguments which again link to the assumptions of the shared liberalism in the world-system, the national project required member citizens of the socialist state to identify with its objectives and participate in its development. The implications for education are apparent, and reinforced in the approach by more direct influences on specific models of schools used by the state, their organisation and teaching methods, from world cultural understandings, global organisations, and economic development plans.

The need for the world-systems approach developed in this research, is seen in the significant detail in the case of Cuban policy and practice, related directly to very specific world-economic influences, and the general geoculture of development. That is, while world cultural arguments are included (under the label of geoculture), the detail demonstrates the need for the inclusion of the world economic perspective. Before outlining the specific research and main arguments applying this appraoch to the case of Cuba, however, some consideration of the role of specifically national influences within the world-systems approach need to be considered.

National influences in a world-systems approach

I have argued that the shift to a world-systems approach to the development school education in a national setting necessarily implies that national socioeconomic and cultural phenomena are insufficient for explaining this development. That is, the nation-state is seen as an interdependent part of the world-system, such that it needs to be understood in relation to world-systems influences rather than as an independent unit of analysis. The location of the nation-state in the world-economy, the impact of trade within this economy, and the influence of a world-system level geoculture of development, are thus key points in understanding national schools. As I have emphasised with respect to the problem of educational change in Cuba, at the core of the analysis is the need to incorporate these world-system level influences to account for the convergence of the schools established with those in other parts of the world. This approach, however, does not necessarily imply that national schools are simply determined by the requirements of the capitalist world-economy, and strengthened by its associated world geoculture. Instead, the world-systems influences condition or constrain national events, which in turn interpret and interact with these influences.

In contrast to this idea of looking globally rather than nationally to explain convergence in school education, Green's (1990) historical analysis of the creation of state-sponsored public school systems asserts that the specific processes of state formation impacts on the development of school education in nation-states, accounting for national differences in the timing and specific character of national systems. Looking historically beyond this century's mass extension of public education, Green (1990) argues that national explanations which focus on liberal functionalist or critical Marxist reproduction theory are inadequate.[9] This argument is based on the disjuncture between theory, in which education responds to the needs of capitalist industrialisation, and the consolidation of national educational systems in the pre-industrial period. In

[9] The 'liberal functionalist theory' as described by Green (1990) fits within the Whig historical tradition, in which mass school education spreads as the result of the universal progress under enlightenment values and the spread of democracy; and the 'critical Marxist reproduction theory' has schools emerging in response to the needs of industrial capitalism, and the associated industrilisation and proletarianisation.

particular, Green (1990) cites Prussia and France which were ahead of England in terms of establishing and developing national school systems, but lagged significantly with respect to industrialisation. He uses this historical analysis to argue that the process of national state formation is the critical feature in the development of school education, using a Gramscian model of semi-autonomous educational sites achieving hegemony for the state (see Green, 1990, pp. 76-109).

Green's (1990) critique highlights the issue of whether the specific, semi-independent or semi-autonomous, national factors need and are able to be included in the world-systems approach to the development of national systems of school education. Clearly not only the content of world-system level influences on nation-states and national schools needs to be considered, but also the nature of this influence. The question is again one of whether this influence is a functional or mechanical, uncontested process determining national institutional structures and policies; or whether it is allows for a specifically national context interacting with world-systemsic factors. Put another way, do world-systems factors determine national developments; constrain possibilities within nation-states; or act as just one of many influences? Further, do world-systems influences impact directly on schools via external intervention or involvement, and / or more subtly via cultural 'borrowing' and the geocultural goals of national development?

Again the work of Ginsburg et al. (1990; 1991) provides the outline for a model that addresses the question of world-systems influences interaction with the context of the nation-state. Rejecting the idea of the global economy determining "in some simple direct correspondence how education and the state in any society are structured or restructured" (Ginsburg et al. 1990, p. 489), they argue for contradiction and conflict as the capitalist world-economy impacts on national settings. Within this approach "the "state" [remains] … a key concept in both national and world-system-level analyses, especially within Marxist conflict approaches" (p. 489). The outline then highlights the dynamic interaction between the nation-state and the world-system, the nation-state having a degree of relative autonomy from the world-system level influences.

This type of approach is persuasively developed by Roger Dale who, in writing about the modern nation-state within the world-system, asserts that "while the world economic

system may be indifferent to national boundaries, this does not mean that national frontiers signal *no* distinctions of any real importance" (Dale 1987, p. 200). With specific reference to contemporary educational reform in New Zealand, Dale (1994) argues that world-system level phenomena, such as a world economic crisis, "have to be interpreted nationally, translated into policy problems that the national state apparatus can address" (p. 18). Critically for this analysis, in this model of semi autonomy for the nation-state, Dale (1994) suggests that the world-system level influences are a "matter of constraints and limits rather than determination" (p. 19). Indeed, he cites Green's (1990) work in support of a perspective with an "emphasis on national specificities (within constraining and limiting parameters over which individual nation-states have little control)" (Dale 1994, p. 22). The point being made by Ginsburg et al. (1990) and Dale (1994), is that explanations of national education reform require a world-system level approach that do not exclude independent local or national level determinants of policy and / or action, but instead see these specific responses of the nation-state as conditioned or constrained by, and potentially interacting with, the processes and influences of the world-system.

The world-systems geocultural approach thus allows for the possibility that national conditions and processes, including the process of state formation, will be consequential for the specific development of mass school education. The role of national education systems in the resolution of core problems of the state, such as the need for the capitalist state to achieve support for capitalist accumulation; guarantee ongoing capital expansion; and legitimate the capitalist mode of production (see Dale 1990, p. 28), are thus not dismissed. Similar needs and core problems for the socialist state, related to legitimation and the processes of socialist accumulation and distribution, will necessarily impact on school education. Further, the specific socioeconomic problems of the state, and the historical and national cultural legacy of the government, will also impact on particular features of the expansion of schooling. These national processes, however, do not displace world-systemic influences. Rather, they are tied to the ways in which the state responds to, interprets and articulates its response to the world-systems constraints within which it operates.

Finally, the argument could be made that the study of a single nation-state under the heading of a world-systems approach is contradictory, given the inherent claim of such an approach that the only unit of analysis that matters is that of the whole world-system (see for example Skocpol 1977). A recent response to this criticism has been outlined by Arrighi (1998), who points out that there is a distinct difference between treating nation-states as independent entities or units subject to self-contained analysis, and a world-systems approach that treats them as "institutions of the modern world-system" (p. 118). The world-systems approach used and developed in this research seeks to make some contribution to this response.

Research methods for the study of secondary schools in Cuba

Much of the research for the historical analysis was undertaken in Cuba, over a period of fifteen months. The bulk of this research involved accessing and reviewing a wide range of Ministry of Education documents, including Ministerial Resolutions and related laws and decrees on secondary school reforms over the thirty year period, and other official reports and submissions to national and international conferences. In addition, secondary Cuban sources were reviewed through journals like *Educación* (the official journal of the Ministry of Education); *Economía y Desarrollo*; the recently relaunched *Temas*; and the new *Acuario* journal from the *Centro Felíx Varela* independent think tank. Additionally, a range of other secondary Cuban sources were consulted, including books related to education, the formation of the youth and Cuban economics; PCC documents and reports; speeches by Fidel; and research reports from different research centres and government agencies. These Cuban primary and secondary sources were complemented by secondary histories of the Cuban Revolution and specific secondary analyses of Cuban education within the Revolution.

In addition to this documentary research, some select interviews were carried out with teachers and principals in secondary schools, a former Dean of Teacher Education, and the head of the *Centro Felíx Varela*. Three basic secondary level high schools were visited for two weeks each (one of these a polytechnical school), in which I observed classes and spoke informally with students and teachers. Given that the research takes 1991 as its end point, these observations and interviews provided a means for the author to confirm general ideas about the historical development of secondary schools, rather

than as direct sources of evidence for the analysis made. In conjunction with the experience of living in Cuba over fifteen months, they also helped to gain a sense of general community, student and teacher attitudes towards, and assessments of, school education in revolutionary Cuba.

The historical research involved the review of Cuban sources in order to identify the official attitude of the revolutionary government, and Ministry of Education, towards school education, the reasons given for its expansion and the intended outcomes of the its expansion. Formal policy initiatives, statements and reforms were reviewed from a similar perspective. The analysis of the documentation looked for evidence of world-system and national influences. This was done primarily by looking for evidence of economic and socialist political objectives for secondary schools within the documents; and establishing a detailed picture of the actual structure of secondary schooling, the vocational and academic specialisation, and the processes and forms of organisation within the schools. As with any historical research, the documents were approached with the view that they might potentially contradict and disprove world-systems arguments. The subsequent analysis not only finds national and world-system level economic and geocultural influences in school educational policy, but also demonstrates how the nature of their influence and interaction functioned in revolutionary Cuba.

The world-systems geocultural argument for the historical development of secondary schools in revolutionary Cuba

The documentary evidence on secondary schooling in revolutionary Cuba supports the need for a world-systems approach to explain how and why Cuba's revolutionary, new, socialist schools came to so closely resemble conventional models of secondary schools found across the world-system. Policy statements, ministerial resolutions and secondary commentaries about the new schools consistently and explicitly cited their contribution to and articulation with planning for national economic development generally, and elaborated policies to link secondary schools with specific economic strategies and industries to maximise development within the world-system. Similarly, the research will identify consistent evidence of Wallerstein's shared features of liberalism, and the geoculture of development, both implicitly and directly in secondary school policy. The model of schooling, with its selection and specialisation functions

and procedures, and other internal features, emerge as providing continuous support for the expanded geocultural perspective. These include the underlying and unquestioned objectives of the new schools, and the particular world cultural form of secondary schooling constructed.

The national context and the world-system

The historical analysis that follows in the research, first establishes the national political, economic and social context for the chronological time periods, and the ways in which this influenced secondary school education reform. This is premised on the assumption that educational policy was not immune from the broader considerations, priorities and events of the Revolution, and hence cannot be adequately understood solely in its own terms. It was and remains an interdependent part of the broader political economy, and the political project of the Cuban Revolution. Just as analyses like Eckstein's (1994) have argued that domestic socioeconomic and political policy was based in pragmatic responses to national economic conditions, so to are developments and policy responses for secondary schooling linked to the historical economic and political conditions and constraints of the Cuban Revolution.

More critically for the world-systems approach, however, an assessment of the national context for the historical period establishes some of the specific world-economic and more general world-systems geocultural influences over the national political economy of the Cuban Revolution. With respect to the influence of the capitalist world-economy, the major impact is found in the inherited 'underdevelopment' of the country as a consequence of its location in the periphery of the world-system, and inherited monoculture in exports and reliance on imports for value added manufactures. The legitimacy of the revolutionary government, and indeed its popular support that allowed the Revolution to triumph, thus rested heavily from the beginnings on its program of achieving development for the country so as to improve its relative position within the world-economy, via planned, domestic industrialisation, diversification and growth. At this level, the capitalist world-economy effectively raised the objective of accelerated national social and economic development to a central part of the broader political project. The inherited position also continued to create problems

for the island's planned development project. Both of these are reflected in the review of the national context.

Also identified implicitly in the national context are geocultural understandings of concepts like 'national development,' 'growth,' 'industrialisation,' 'progress,' and the perceived possibility for the island to achieve these. Revolutionary Cuba continued to participate in the capitalist world-system – as a member of the interstate system and participant in the global division of labour. Thus revolutionary Cuba continued to: a) suffer the negative consequences of variable world commodity prices for primary exports, these being necessary to secure hard currency for essential imports; b) rely on readily available primary agricultural exports like sugar and other goods to finance imports and plans for industrialisation; c) depend on international hard currency finance to service trade deficits leading to problems servicing foreign debt; and d) confront the structural obstacles to its development goals by virtue of its location within the capitalist world-economy.

Schools, the world-system and national economic development

Based in part on this assessment of the world-economy impacting on the national context, the research argues that this process promoted and reinforced attempts to directly link secondary school educational structures and policy reforms to plans for economic development. Ongoing problems achieving and sustaining economic growth and development, and hence the constant weight of such goals in the political program, favoured viewing secondary schooling as an investment in human capital. Specific economic strategies were applied as part of the development program, in response to these problems and with direct implications for secondary schooling. For example, strategies of diversifying the national economy and developing new industries brought a range of trade schools and later polytechnical schools and institutes, providing specific vocational training at secondary school level. Similar strategies to modernise agriculture produced corresponding institutions specialising in agricultural sciences.

Thus the influence of the capitalist world-economy on Cuba is shown to have promoted and / or reinforced the development objective of the revolutionary government. The geoculture of development within the world-system further reinforced

this objective across government policy and practice. Thus the argument is developed for a broad world-system influence constraining or conditioning developments in secondary school education, in part by giving priority to the need for national development. In addition, the world-system influence is seen as influencing the social and political culture in such a way that independent development for the sovereign, socialist, nation state was viewed as not only a possibility, but likely. The rational and planned application of science and technology, and preparation of skilled and disciplined personnel to carry this out, would ensure that development was achieved. Hence a consistent emphasis identified in policy on preparing students in secondary school for work, providing both basic and work related skills, and instilling desirable values and attitudes towards work, provides further evidence of the world-systems influence.

The premise that appropriate secondary school education could make a positive contribution to national economic development in the immediate and long term, is another related and constant feature of the geocultural influence. Regardless of the policy's success, this premise emerges as being unchallenged, or part of common sense knowledge, within secondary school policy. The world-systems geocultural belief in development thus extended into the perceived role of secondary school education. The combination of these world-systems influences is found across the general objectives of policy, and specific structures, reforms and practices of secondary schooling. The division of post basic secondary schooling into academic or vocational streams, with specific specialisations within them, is thus analysed in these terms. So too are the creation of elite, selective, upper secondary schools; the use of academic testing to evaluate student performance and select students for different specialisations; the implementation of the principle of work-study in secondary schooling; and a range of other specific reforms.

Secondary evidence of the world-systems geocultural influence on this premise of secondary schooling in Cuba is also cited, for example William Connell's (1980) analysis that identifies some sixty countries in the 1960s "planning educational development to meet the needs of future manpower (sic) requirements forecast by economic planners as necessary to attain some economic target" (p. 413). Hindson

(1992) also confirms the extent to which human capital theory has influenced education in "developing countries" as part of their "modernisation," leading in turn to international comparisons of education systems designed to provide for the developing country the "number and type of skills 'required' by the various economic sectors" (p. 154).

From the analysis of primary and secondary Cuban documents, a picture emerges of specific policies in secondary schools being influenced by a world-systems geoculture of development, reinforcing alongside the more direct world-system economic influence, a conception of secondary schools as part of national economic development plans. In this context, models and ideas of secondary schooling were consciously borrowed from other states, as was particularly the case in the 1970s, and less directly inherited and applied as part of the unquestioned adoption of dominant institutional models within the world-system, under the implicit institutional rules of the world culture. Consistent evidence is also found of formal intentions to use secondary schools to create members of citizens of the socialist state. Like the citizens referred to by Ramirez and Boli (1987), those sought in Cuban schools were clearly intended to identify their personal interests in part with those of the broader state and society. Hence, they would view their education as both a right and social duty, which trained them to better contribute to the national development program.

In these broad ways then, I argue that secondary schooling in Cuba was conditioned by these world-systems geocultural influences, through their direct and indirect impact on the national context, and specific school education policy. The historical evidence, supplemented with secondary analysis, supports the approach as a way of explaining how and why secondary schools in revolutionary Cuba were established and developed in the ways they did, and why the radical rhetoric did not translate into fundamental change.

Schools and socialist citizens

The other main trend identified in secondary school policy and objectives in Cuba, which seems to run against the argument that schools were fundamentally unchanged and that world-systems influences shaped the domestic initiatives, is the consistent and

public attempt to use secondary schools for students' socialist and communist political formation. At one level, this emerges as an example of specific national interests and conditions impacting on policy and reform. The objective brought substantive changes to secondary schools, including the introduction of new political subjects and political activities for students; the reform of content in existing subjects; and the attempt to involve all secondary students in productive work to instil a working class consciousness of a producer rather than consumer. As with economic objectives, the question is not so much whether these reforms successfully achieved their outcomes, but the fact that they were incorporated into formal policy, with real consequences for school structures and practice. This point is noted in the analysis.

A deeper analysis of the political objectives and policy reforms, however, beyond their stated goals, is required in order to situate formal policy in the world-systems geocultural approach. Two main points emerge from this analysis. First, that the socialist political objectives for secondary schools can be interpreted, in part, as falling within the world-systems geocultural framework of viewing public schooling as a means of socialising citizens (or creating members) of the nation-state, with some level of personal identification and commitment to the state, and to taking their place in work and society. This interpretation is seen to be defensible in the case of Cuba, albeit expressed in terms of 'new socialist citizens,' with numerous indications of policy seeking to have students internalise convictions about the government's political project, and their need to work hard so as to effectively contribute to this project.

Secondly, and most importantly, over time the political objectives of Cuba's schools were increasingly shaped and articulated in terms of the economic development goals. That is, communist formation became the development of a communist attitude towards work. Socialist and communist values to be instilled in students related to those consistent with hard, disciplined, productive and efficient work. Political commitment was measurable through students' preparedness to undertake vocational training and subsequently work in whatever capacity was required by the Revolution. This analysis acknowledges the ways in which the development objectives were politicised in the domestic context of socialist Cuba, with national wealth and income being considerably more equitably distributed than in capitalist states. Hence, claims that all citizens had a

collective interest in contributing to national development are verified. The process of socialist political goals converging with the economic development objectives, however, is presented as further support for the world-systems approach, in which these world-system related economic influences conditioned the expansion of secondary school education.

National influences within the world-system

Finally, the research does not discount the process of specific features or characteristics of the national context impacting on schools and national policy, within the world-system framework. For example, the economic development imperative is consistently interpreted in terms of the domestic political commitment to the egalitarian distribution of production and income. Similarly, the functional selection of students for vocational specialisations in upper secondary level, to meet labour force requirements, was mediated by a system providing multiple pathways and opportunities to continue studies and enter tertiary education. In the most distinctive feature of the Cuban system, an attempt was made to have all secondary students enrolled in full boarding schools, engaging in productive agricultural work for a part of each day as part of their formal school program. Whilst a world-system influence is found in this reform, in terms of a return to a strategy of agricultural export financed development, and a more immediate problem of financing the expansion of secondary schooling, a real influence of national political objectives is also acknolwedged to be at work.

In this way, the world-systems geocultural approach is used for the historical analysis of secondary schools, conditioning or broadly shaping their expansion, their formal economic and political objectives, and the actual form and organisation of the schools built, within the context of historical, revolutionary Cuba. The approach explains the dominance of the economic emphasis in secondary school policy, how this impacted on measures to provide specialised occupational training in secondary schools, and how these are related to the influence of the capitalist world-system over the Cuban Revolution as an historical political project, and specifically over school education. Above all, the approach provides a framework for explaining why, in the historical context of revolutionary Cuba, in which the potential for an authentic and fundamental

shift in education was high, a largely conventional model of secondary school, with conventional objectives, structures and practices, emerged.

Limits of the argument

The focus of this research is on providing a macro-level explanation for the type of secondary school that emerged in revolutionary Cuba. This explanation concentrates on the combination and interaction of national and world-system level influences, related to economic factors which impacted on the nation-state and its plans for school education; and world-system level geocultural factors similarly conditioning thinking about schools and their shape and function in society. The approach taken is not arbitrary, but a contribution to arguments for a world-system level influence on national school education. Furthermore, it is firmly linked to the capitalist world-economy. In pursing this research I am well aware of what has not been studied, in particular the lack of analysis about differentiation in Cuban schools based on race, gender, or other criteria. This absence is not intended to silence these processes, not to exclude the possibility that such differentiation occurred. Race and gender, and other forms of differentiation, are politically important, and almost certainly a part of the school educational process established in revolutionary Cuba, to some degree and in some specific and general ways. In the world-system argument developed, however, this level of differentiation is not the main determinant shaping the expansion and development of secondary schools over time. It is these macro-level causes and influences that this research identified.

CHAPTER OVERVIEW

The chapters that follow are set out chronologically, each dealing with specific period of Cuba's revolutionary history. Each chapter makes some conclusions for the specific time period, based on the available evidence and specific features of the development of secondary schools. A cumulative argument results, as fundamental continuity in secondary school education structures, practices and objectives, emerges across thirty years of domestic upheaval and change.

Chapter I

Chapter I covers the period from the triumph of the Revolution in 1959, through its 'popular-democratic' period until the official adoption of a socialist program in 1961, and then the 'radical' period of socialist construction up to 1966, when formal debate over models of and strategies to achieve socialism was closed. The chapter deals with the immediate response to school education under the Revolution, and the expressed revolution in education, measuring the radical rhetoric against actual change.[10] The massive and rapid extension of mass, public education to all citizens is documented, along with the first policies revising the content of school education, and other initiatives, as part of the attempt to realise socialist objectives through school education. These are set against the context of the national political economy, and the strategies for growth, and development, in the early stages of the Revolution.

The chapter identifies the expansion of schooling based on universal access, the specific model of secondary schooling established, and the initial political and economic objectives envisaged for the new system. The priority of national economic development in the revolutionary project is established, and linked to world-systems influences over the Revolution and its school education policy. Thus the early influence of models for secondary schooling as preparation for work, as part of development goals, is documented. The objective of forming new socialist citizens through secondary schooling is also described, identifying within this world-systems influences in the shape of creating productive, loyal and hard working members of the socialist state, prepared to contribute to its political (development) project.

Chapter II

Chapter II covers the latter part of the 'radical experiment' of the Revolution, including the emerging economic and political crisis over 1966 to 1970, and the

[10] The notion of a 'revolution in education' was one much referred to by Fidel and the Cuban leadership. The idea was so much a part of the official rhetoric, that a collection of speeches by Fidel about Cuba's socialist educational project was entitled "Education in Revolution" (*La Educación en Revolución*) (Castro 1975a).

beginnings of the shift to the Soviet Union. The historical context of Cuba's domestic economic problems and strategies, and its foreign relations within the socialist bloc, are outlined in some detail in this chapter, before developments in school education are addressed. This is necessary, given the significant political and economic upheaval of the period, and the impact of the domestic political economy on national policy options. Further, this most radical period of political independence provided arguably the best climate for a unique educational response. The national turmoil, and particularly the economic pressures leading to the shift towards political and economic alignment with the Soviet Union, underline the extent to which the processes of the capitalist world-economy shaped the national context and constrained what the revolutionary government was able to achieve in terms of its planned, accelerated development program.

On this basis, chapter II outlines economic influences on school education in the form of the perceived economic contribution of students productive work, and the development of the model of specialised, vocational, upper secondary level training, responding directly to national economic planning. The political objective of forming the new socialist citizen is noted, with the principle of work-study being consolidated as a major strategy of achieving this goal. At this early stage, the articulation of political goals for secondary schools in terms of national economic development is noted, providing initial evidence of a world-systems influence over the whole educational reconstruction. These indications include the identification of political values and attitudes for students including positive attitudes towards work, the broader development project, and the social duty of citizens to contribute to these. Thus the basis for the world-systems geocultural influence shaping the development of secondary schools is well established in the first decade of Revolution.

Chapter III

Chapter III covers the historical period of rectification and institutionalisation, from 1970 until the first Congress of the Cuban Communist Party (PCC) in 1975 and the adoption of the Socialist Constitution in 1976. It begins by outlining the national context of political and economic alignment with the Soviet Union, and integration into the socialist bloc's Council of Mutual Economic Assistance (CMEA). This is

documented in terms of the significant shifts in domestic policy, including the consolidation via the Soviet influence of development goals, with national economic development set in the Soviet Marxist-Leninist orthodoxy as a measurable prerequisite for constructing first socialism, and then communism. Improved national economic performance within the socialist trading bloc is also documented, reinforcing the world-systems influences brought in via the Soviet Union with respect to school education as the preparation of labour.

The 'improvement' or *perfeccionamiento* plan for the national education system was elaborated in the period, its details and implications for the structures and economic and political objectives of secondary schools described. Highlighting the Soviet and world-system influence, the consolidation of the earlier trends are noted. That is, ongoing specialisation, systematic processes for selection of students into different sub-systems, and the role of differential credentials in the labour force. The expansion of the secondary schools in the countryside is reviewed, highlighting its political and political basis, and the ongoing connection with the geoculture of development by making agricultural work a national priority. The first systematic attempts to include the study of socialist politics, and Marxism-Leninism, in secondary schools are also reviewed, as potential examples of a radical educational response. Finally, the overall consolidation of national development objectives throughout the conception of and policies for socialist school education, as evidence of a world-systems influence, is emphasised.

Chapter IV

Chapter IV continues the analysis in the same way, outlining the national context from 1976 until the political 'rectification' away from Soviet models that began in 1986. Here again considerable detail of the economic and political reforms instituted over the period is provided, highlighting the ongoing problems of world market commodity prices, and international finance and debt, on the Cuban economic performance.

Continuity in educational policy is asserted again as the major characteristic of the period, explained by the world-systems approach. Political objectives are identified in the inclusion of Party documents and official ideology into schools, while economic development objectives continued to affirm vocational and academic specialisation at

post-basic secondary level. This continuity was consolidated by an increased emphasis on Polytechnical education; a push to orient all students towards specific vocations; and reforms in student assessment procedures to more efficiently select students for differential options based on their academic performance. Once again, specific structures of secondary schooling, policy reforms and in class practices are identified as reflecting world-system level models of schooling, linked to economic and geocultural influences.

Chapter V

Chapter V concludes the substantive, historical analysis of secondary school education, covering its development under the official 'rectification campaign' that criticised and sought to correct some 'errors and negative tendencies' of domestic policy introduced since the Soviet alignment began in 1970. The research period ends with the first signs of the collapse of international Communism, and the implications of this began to be articulated and felt in Cuba.

The structure of this chapter shifts slightly from the previous chapters, in a first attempt structure the analysis in a way that makes the world-systems approach central at all points. The context of the national political economy is set out, linked to world-system conditions and influences, establishing the conditions in which school education was situated. The analysis of secondary school education that follows is now set out under sub-headings that reflect world-systems influences, and focusing on how these influences conditioned national policy in this period. In the process, the shared world-systems conceptions of and about secondary schooling, and its roles, structures and objectives in society, are confirmed in the context of socialist Cuba. The identification and documentation of ongoing continuity in secondary school education policy, in this period of overt rectification and socialist political and ideological renewal, strengthens the world-systems geocultural approach as a way of explaining this historical development.

Conclusion

The final conclusion sets out again the main arguments of the research, in light of the historical analysis developed from a world-systems geocultural perspective. The

historical trends identified in secondary school education, linked to the world-systems influence, are summarised. This is followed by a detailed elaboration of what constituted this influence and the ways in which it was experienced in the context of Revolutionary Cuba. Some conclusions are subsequently set out, with respect to explaining the historical development of secondary schooling in revolutionary Cuba, and more generally the world-systems approach to school education within the field of comparative education. Finally, some potential areas for further research arising out of this work are foreshadowed, particularly ongoing historical research on revolutionary Cuba.

A final note on politics

Any research on revolutionary and socialist Cuba is, by definition, political. There are clear tendencies, within existing historical work on the Cuban Revolution, of polarised perspectives ranging (to different degrees) between sympathetic and critical accounts events in Cuba since 1959.[11] The radicalism of the Cuban Revolution, the resulting polarisation of Cuban society and emergence of a hostile exile community in the United States in response to revolutionary policies, and of course the political polarisation of onlookers sympathetic or hostile to the idea of an anti-capitalist and anti-imperialist social and socialist revolution, have all necessarily politicised the study of Cuba. The ongoing presence in government of many of the original Revolutionaries, most notably the Commander in Chief Fidel Castro-Ruz, and the related ongoing influence of the Cuban Communist Party in Cuba, has helped to sustain this tendency.

To suggest that the historian or analyst can somehow be removed from the politics of this context is of course indefensible. Personal political bias is present in some way in the very choice of Cuba as a site for study, and subsequently in the areas of focus, the research questions investigated, the problems identified for study, and so on. Hence this study makes no false claims to political neutrality. My interest in Cuba stems directly

[11] For recent examples, compare for example the anti-Castro tone and premise of Schultz (1994) with the sympathetic tone of Halebsky and Kirk (1985; 1990; 1992).

from the progressive changes brought by the Revolution: the attempt to create an alternative, participatory domestic political system; moves towards socioeconomic equality; the attempt to replace profit with social need as the criteria for determining production; an active anti-imperialist foreign policy; and educational measures including the popular literacy campaign, and the extension and equalisation of access to public education. Despite the close alliance with the Soviet Union that emerged in the 1970s, and the many negative consequences of the uncritical adoption of Soviet models, the socialist project in Cuba appeared to have retained a more humanistic character, and maintained widespread popular support on the island (see for example Blanco 1995; Diana and Beverley 1995; Martínez Heredia 1995a).

Given this political interest, I am also aware that the often critical perspective of the research; the questioning of some official policy objectives and intentions; and indeed the very premise that in fundamental ways the Cuban Revolution failed to revolutionise school education, may be interpreted as damaging to the Cuban cause. Such an outcome is at no stage intended, and support for progressive, anti-capitalist / anti-systemic, egalitarian and democratic social change constantly underlies the work. An uncritical acceptance of formal policy statements, or repetition of the acknowledged and truly impressive gains in terms of the physical expansion of the whole education system, however, was not seen as contributing to this progressive, anti-systemic commitment.

Above all, this research and the researcher seeks to provide a broadly sympathetic, but critical, historical world-systems account of secondary school education in revolutionary Cuba, contributing to this specific area of research and the broader area of comparative education. The acknowledgment of problems and prescriptions for their solution has been periodically made within Cuba, but usually in the form of official statements and policy reforms without substantive critique and debate. Periods involving the official identification of ‘errors,’ and their consequent ‘rectification,’ have tended to come from the top down, identifying problems in the context of official solutions being provided. Research moving beyond the rhetoric of policy to a critical analysis of the different influences on policy, and particularly world-systems influences on the socialist state is thus the more productive task politically. The research aims to provide an adequate historical interpretation in the case of Cuba by highlighting the

ways in which the capitalist world-system (via world-economic and geocultural processes) conditioned the national policy responses and possibilities, as a prerequisite to developing broader, anti-world-systemic, criteria into progressive work on educational and political action.

Chapter I:

Popular revolution and independent socialism: Mass expansion and the new education

The Cuban Revolution began when the insurrection ended on January 1, 1959. It was not just a *coup d'état*, or change of government, or an era of drastic reform; it was a transformation of Cuban life…

- Matthews (1975)

INTRODUCTION

The triumphant Cuban Revolution was both the culminating point of a long struggle against the Batista backed dictatorship and the underlying domination by the island's powerful northern neighbour, and the beginning of a dramatic transformation of social, political and economic life for all Cubans. Much of the world, and almost certainly the Americas, watched closely as Fidel Castro emerged from the mountains and entered the streets of Havana city on January 8 1959, alongside his young comrades in arms. Fidel and the Revolutionaries were welcomed with massive euphoria at the defeat of Batista, and outpourings of support for and personal allegiance to the Revolution's charismatic national hero.

From the very beginning Fidel, along with other leaders of the Revolution like his brother Raul, Camilo Cienfuegos, Ernesto "Che" Guevara, Armando Hart, Celia Sanchez and Melba Hernandez, seemed to provide the Cuban nation with perhaps its first real opportunity to regain "national dignity" and achieve the historic dream of *Cuba Libre* (a Free Cuba). The young revolutionaries, with enthusiasm and a disregard for orthodox or conventional truths with respect to what their successful Revolution could achieve, offered an image of the future to the Cuban population of authentic, national, political and economic independence. They invoked ideas, however confused, of both "liberal-democratic reforms *and* a radical social revolution" (Matthews 1975, p. 97), with a program of independent national development in which the rewards would be more equitably distributed to all loyal citizens.

One of the numerous issues the Rebels quickly set out to redress, reform and revolutionise, was public school education. This was a priority for the revolutionary government, with extraordinary changes occurring in the first few years of the Revolution. Fidel had indicated the importance of radically reforming and expanding school education as early as his trial in 1953 for the attack on the Moncada Barracks, marking the first serious attempt to remove the dictator Batista.[12] In the now famous speech, *History Will Absolve Me*, from his trial in which the young lawyer defended himself, Castro attacked Batista's record on public education. He highlighted the lack of technical / industrial training, corruption, and the need to improve wages and conditions for teachers and integrally reform the national system to link it to the social and economic projects of a revolutionary government (Castro 1968a, pp. 39-42). The reform of school education was firmly on the agenda of the revolutionary government, and the potential for something radical and unique to emerge in this context a real possibility.

Change for public school education began almost immediately and was substantial in the first two years of Revolution, its "popular democratic" stage (Rodríguez García 1990, p. 28). As the island shifted into the period of "socialist revolution," reforms were extended accordingly. A massive literacy campaign mobilising literally hundreds of thousands of youth throughout the entire island was launched in 1961, named the 'year of education,' alongside plans to rapidly and massively extend the provision of primary education to both the recipients of the literacy program and those of primary school age not previously enrolled in school. Military fortresses of the previous dictatorship were converted into schools to meet the demand, whilst thousands of secondary school age students, many returning from their work in the literacy campaign, underwent concentrated, emergency teacher training courses to staff the new institutions. Politics were brought explicitly into the classrooms as the revolutionary government publicly acknowledged a role for the school to support the state and its institutions. Moving into

[12] As a response to Fulgencio Batista's seizure of power in Cuba via a military coup, the brutality of his regime, and the failure to force elections through a legal challenge, Fidel Castro led an attack on the Moncada barracks on the July 26 1953. From this attempt to spark a popular uprising to overthrow the dictator, the 26th of July Movement that led on Revolution on January 1 1959 was born.

the socialist phase the government set about consciously directing school education to the task of forming the "new socialist citizen" deemed necessary to guarantee the future of the socialist revolution and its march towards communism.[13]

The early stages of the Revolution saw high expectations, enthusiastic mobilisations of the population, and grand plans for accelerated economic diversification, development and industrialisation. These were, however, intertwined with serious economic problems as the Rebels sought to use their newly won state power to impose often generalised and changing visions of the future Cuba onto reality. In place of the envisaged communist material abundance shortages and rationing emerged, whilst broad based popular support was further tested by capital flight and the exodus of professionals and other skilled personnel as the popular-democratic revolution entered its socialist transformation. Military and economic hostility from the United States and its allies added to the problems, and simultaneously deepened the radical, anti-capitalist and anti-imperialist posture of the leadership. The state was committed ideologically, and pragmatically in terms of its legitimacy, to comprehensive social programs and increased consumption rates. This occurred alongside the task of reconstructing the island's national economy to overcome its dependence, unequal trade, and underdevelopment. Viewing economic development and growth as absolutely fundamental to both the survival of the revolution and the construction of socialism and communism, the expansion of school education became firmly linked to these plans.

The "radical experiment" of the 1960s, as labelled by Perez-Stable (1993), involved tremendous social change and upheaval on the island, and some significant departures from orthodox or conventional models of school education as it was increasingly made responsible for the ongoing politicisation of the new generations. It was in this context that challenges to the conventional structures and functioning of school education in capitalist societies were articulated. These challenges are found in the re-writing of

[13] The term *new socialist citizen* is used in the place of the "new man" (*hombre nuevo*) coined by Comandante Che Guevara in his essay, *Man and Socialism in Cuba*. New socialist citizen overcomes the gender bias of the Spanish language and its literal translation, and fully expresses the goals envisaged by Guevara for students of the new Cuban school.

school programs and texts, the participation of students in political activities, the introduction of the *estudio-trabajo* (work-study) principle as the precursor to the schools in the countryside, and the provision of education to all social groups.[14] These departures add to the perceived possibility of a new school education being built in Cuba.

I will argue in this chapter, however, that espite the perceived possibility of a distinctively new school education in this radical period of social change, these departures were consistently underscored by more conventional conceptions of school education. That is, school education as an investment in human capital that would contribute to main plan for economic development and growth. In this and other areas, aspects of the economic and geocultural influence of the capitalist world-system are identified in the early stages of Cuba's educational reconstruction and policy formulation.

This chapter establishes a basis for the broader thesis: that the capitalist world-system constrained and shaped the development of secondary school education in revolutionary Cuba, through its direct, structural impact on the national economy, and the geocultural influence on the revolutionary project in general. That is, that the radical reform of school education, on closer analysis, reveals similar assumptions, objectives and structures to other models of school education, these in turn being accounted for by a shared geoculture of development across the capitalist world-system. This is done through a chronological examination / assessment of educational reforms, policies and structures in the decade, from which the main features of the educational reconstruction emerge. These are identified as:

1. the massive and rapid expansion of first primary and then secondary school education to provide universal access for all;
2. the inclusion of socialist ideology into secondary schools, as a part of the Revolution's political project to socialise politically loyal citizens;

[14] This commitment to formal school education for all citizens extended to systematic efforts to provide special, formal educational facilities and enrolments, at primary, secondary and tertiary levels, for adults, farmers and workers.

3. the inclusion of national economic development objectives in formal secondary school educational policy; and hence in conclusion
4. a conditioning influence of the capitalist world-system over Cuba's socialist economic and social project, and associated ideas of the roles and functions of school education for national development and political stability.

The analysis of Cuban schools in these first years of revolution provides evidence of these processes, and supports some preliminary conclusions with respect to the capacity of world-systems influences to explain national educational reform. That is, that Cuba's radical political objectives to nationalise, expand and politicise school education for all citizens, from their beginnings, simultaneously incorporated and articulated goals for national economic development and legitimacy. The politicised vision was conditioned by the constraints and perceived development needs of the national economy (within the capitalist world-economy), and the worldview of national development's influence on the basic objectives of the socialist revolutionary project.

This analysis is set out in two chronologic sections, reviewing the national context and related developments in school education for the 1959-1961 and 1962-1965 periods. In both the broad political and economic conditions are described, setting the historical context in which educational policy was formulated and applied. In this context, the emergence of political and economic objectives for the new schools, and related policies to achieve these, are identified. Following this, some preliminary observations are made with respect to the world-systems geocultural influence over these early reforms, and the underlying assumptions about and intended functions of secondary schooling in revolutionary Cuba.

THE *POPULAR-DEMOCRATIC* REVOLUTION AND MASS EXPANSION OF SCHOOL EDUCATION, 1959-1961

The first two years of Cuba's nationalist revolutionary process created the conditions for its shift from a declared popular-democratic and humanist, to a socialist and Marxist-Leninist, Revolution. By October of 1960 capital like the United Fruit Company, foreign owned oil refineries and all U.S. owned companies, were nationalised as the island confronted intense U.S. economic and political pressure, covert terrorist action, a CIA sponsored military invasion by exiles, and the nuclear

missile crisis (see Anderson 1997, pp. 493-530). Society was polarised between supporters and opponents of the political and social process, such that significant sections of the minority opposition sought exile in the United States. In this atmosphere, radical ideas were raised for the new education, with its role in legitimating and consolidating the revolutionary process being acknowledged and consciously applied. Huge efforts were made to provide equal educational facilities to the whole population as quickly as possible. Private schools were nationalised to facilitate this process, while the world-renowned 'Literacy Campaign' effectively mobilised the whole country to all but eradicate illiteracy in just one year (see Varela Hernández et al. 1995). The process of reconstructing and expanding school education was also guided by the Revolution's objectives for the social and economic development of the country.

On coming to power the revolutionary government had little in the way of a comprehensive and coherent national socioeconomic program and strategy. Principles had been expressed, and a broad outline set out in the *Moncada Program* (Castro 1968a), but few concrete actions and strategies had been determined (see Brundenius 1984, p. 41). Matthews (1975) describes a state of confusion, as the reality of the Revolution's success, achievement of state power, popular support, and the task ahead for the leadership hit home:

> Fidel Castro was consistent in striving for the goal which was basic to his career and ideals: a radical social revolution ... (Butland) ... He did not know how to go about it; his ideas changed; he tried different solutions (p. 146).

Brundenius (1984) adds that "almost immediately" (p. 41) there was "a clash between Castro's promises to the poor of a better future and his assurance to the capitalist class that they had nothing to fear" (p. 42). This was provoked by the revolutionary government first taking control of the U.S. owned Cuban Electric Company to reduce tariffs to the poorest sectors, followed soon after in March by a "Rent Law" which obliged landlords to reduce rents by up to half (Rodríguez García 1990, p. 40). A few months later under the Agrarian Reform Law the state took control of some 67% of the island's agricultural land, distributing this between small farmers (with a minimum of 27 hectares per family up to a maximum of 402 hectares) and a new state agricultural sector (see Rodríguez García 1990, pp. 28-9; Brundenius 1984,

pp. 42-44). This reform arguably sealed the opposition of the large land owners, and wealthiest domestic capitalist classes and foreign capital.

The early atmosphere was clearly highly charged politically. With terrorist attacks against the leadership and national infrastructure, the population was mobilised to defend the homeland, its newly won political independence, and its plans for economic independence. In this context, the first politicised (socialist) educational reforms emerged.

Early expansion and universal access

In February of 1959, the revolutionary government dictated its *Ley Fundamental* (Fundamental Law), giving some insight into the initial and future directions of secondary school education. First and foremost, the general revolutionary law confirmed the Rebels' commitment to providing "universal education without prejudice" to all citizens, and the process of attacking illiteracy and redressing past educational inequalities between rural and urban areas (Gobierno Revolucionario 1959, pp. 6-7).[15] This built on work already begun in this area during the guerrilla struggle.

This early official reference to the character of the planned system of state school education gives some indication of a fairly orthodox, liberal basis for the system under reconstruction. That is, universal access backed by the expanded provision of facilities, that would socialise loyal citizens of the nation-state and support the state's plans for the rapid economic development of the nation. The Fundamental Law foreshadowed the broad principles of how this was to be pursued, describing:

> predominantly practical rural schools organised in light of the interests of the small agricultural or maritime or any other communities, and art, trade, technical agricultural, industrial and commercial schools oriented in such a way as to respond to the

[15] Particular laws like this are referenced to the *Gobierno Revolucionario* (Revolutionary Government), by year, with details of the publication from which they are cited, provided in the reference list.

> necessities of the national economy (Gobierno Revolucionario 1959, p. 7)].

Laws dealing specifically with education were to follow, notably Laws 559 and 561 in September, and Law 680 in December of 1959 (in Gobierno Revolucionario 1960), in which the broad parameters (and some details) of the project of educational reconstruction were elaborated.

The first of these, Law 559, emphasised a broader, "integral" education with greater importance placed on advancing a sense of history and patriotism, including a call to reform the existing systems of student evaluation to include the evaluation of students' "academic, civic and moral formation" (Gobierno Revolucionario 1960, p. 6). Significantly, the reform also recognised that supposedly neutral assessment procedures could discriminate against particular social groups, and hence called for measures to redress this problem. However, the recommendations on assessment continued to propose orthodox "periodic tests, classroom assignments and a final test of students application of knowledge" (Gobierno Revolucionario 1960, p. 7). That is, academic testing and evaluation of all students in the classroom.

Law 561 invoked the government's commitment to rapidly provide formal education for the identified 1.6 million children between the ages of five and nineteen without access to school, announcing the appointment of four thousand primary teachers and the short-term plan to construct ten thousand classrooms (Gobierno Revolucionario 1960, p. 20). These teachers were persuaded on moral and political grounds to accept a restricted wage for one year to help finance the construction of additional school buildings. These early directions for school education clearly express the spirit of popular revolution, and its commitment to liberal goals of universal, mass education without discrimination.

By the end of the first year the revolutionary government was beginning to provide more details of its educational agenda beyond that of mass expansion. Law 680 addressed school education's role in preparing workers and citizens for the revolutionary state (Gobierno Revolucionario 1960). The law affirmed that the new schools would shape students' character, sentiments, habits and attitudes towards "a

spirit of Cuban identity ... [and] ... love of the homeland and its democratic institutions," in an environment in which individual personalities and natural potential would be fulfilled (Gobierno Revolucionario 1960, p. 23).[16] Thus it was hoped that the school would promote both a national and American (in reference to the whole of the *Americas*) consciousness in students, valuing democratic ideals and international understanding (p. 30). The broad framework included universal access to schools where students' patriotism, citizenship and support for the state were to be developed. Law 680 noted that a "free and democratic society" must persuade, rather than coerce, its citizens of the value of its institutions, and promote critical thinking within its schools (Gobierno Revolucionario 1960, p. 34). Private schools were to be tolerated under the early approach to school education, but subject to stronger state guidelines and regulation with respect to curricula and programs.

These reforms suggest an influence of liberalism on the character of the early Revolution. The expansion and citizenship goals within Law 680 were to be achieved through an integrated, national system in which all citizens could both "fully develop their natural potential," and receive "an effective, general cultural base" (Gobierno Revolucionario 1960, pp. 27 & 33). An early commitment to schools as necessary for "creating members of the nation-state" (Boli, Ramirez, and Meyer 1985, p. 159), that is creating citizens supportive of the state and its institutions and forms of social, political and economic organisation, is evident in the policies. As expressed in the policy itself, schools would help, and were implicitly necessary, to form citizens with a sense of "civic responsibility and obligation ... [and] ... to respect and obey the law" (Gobierno Revolucionario 1960, p. 31).[17]

[16] "Cuban identity" is used here for the Cuban Spanish word *Cubanidad*. This expression is necessarily a 'Cubanism,' derived from the combination of the words "Cuba" and "Identity" (in Spanish *Cuba* and *Identidad)*. The term "homeland" is used for the Spanish *Patria*.

[17] The translation "respect and obey" is used here for the Spanish *respeto y acatamiento*. *Respeto* translates directly as 'respect,' while *acatamiento* is the present participle of the verb *acatar*, which translates as 'to respect and to obey'.

In some senses these early policy objectives and statements were exceptional in their explicit attempt to socialise the population to consolidate political support for the Revolution and its program. In 1960 the Ministry of Education further stated and defended the new government's right to use school education in this way. A public document entitled *Mensaje Educacional al Pueblo Cubano* (Educational Message to the People of Cuba), acknowledged that every society educates its citizens for its own perpetuation, whether openly or implicitly, and hence that the revolutionary state and its institutions were "an instrument of the social objectives of the nation" (MINED 1960, p. 36). In the context of the revolutionary transformation of society, and its social and economic development plans, these functions were seen as all the more important. The long-term prospects of the Cuban Revolution would require, in part, a population "conscious of the necessity to transform the economic and social structures of Cuba" (MINED 1960, p. 58), such that schools, and particularly secondary schools, were set in the broader framework of achieving the Revolution's political and socioeconomic goals.

The historical context of inherited underdevelopment, and dependent-capitalist economic problems in Cuba, further promoted these goals (see Carnoy 1990). The pre-revolutionary educational legacy in Cuba was one of illiteracy, inadequate public school facilities, and an elite system of education catering for children of the upper classes whilst some 50% of primary age students were denied access to schooling. Of those that made it to and completed primary school, a further 50% were excluded from entering secondary school.[18] With respect to expansion, the new government made impressive early advances. To cite just one indicator, whereas in 1958 Cuba had 7567 primary schools with an enrolment of 625 717, by 1960-61 the number of primary schools had almost doubled to 12 248 with over one million students enrolled (Leiner 1985, p. 30).

This expansion, based on the serious and concerted application of liberal principles, was politicised in the historical context of revolutionary Cuba. Similarly, the goals of socialising the required citizens for the state's plans included promoting support for the

[18] See for example Varela Hernández et al. (1995) or MINED (1995a) for a brief outline of some of the most critical problems and failings of public education in the pre-revolutionary period.

Revolution, the government, its laws and institutions. There was also some indication that these would constitute a part of students' official assessment in school. Clearly there is some evidence here of a world culture, or geoculture of the world system, influencing the conception of the role and function of school education that was being entrenched in revolutionary Cuba and its politicised reconstruction of the state and society.

Education and national economic development

Alongside this function of socialising citizens, a major premise of mass school education in the world-system was that it constituted an investment in human capital, preparing people with skills, values and attitudes necessary for work. Implicit in this was the process of sorting and selecting students for academic and vocational tracks within secondary schooling, providing corresponding specialised knowledge and skills within these.[19] William Connell (1980), for example, notes the acceptance within the United States of J.B. Conant's recommendations which identified the three basic functions of public school education as: "general education for all; college preparation for those proceeding into tertiary education; and vocational education for the others" (p. 354). Based on universal access, the goal was for differential training within the system. England for example maintained a diversified system split primarily between academic "grammar," vocationally oriented "modern" and the more liberal styled "comprehensive" school, in the context of providing education, albeit slightly different, for all (Connell 1980, pp. 349-52).

I have shown how early laws supported the creation of citizens for the state in schools, with the policies advocating this type of function to assist in the consolidation and development of the Revolution and its government. These reforms, in particular Law 680, also advocated using the school to prepare students for different positions in the national economy. Core capitalist countries like the United States and Britain saw

[19] The third section of Karabel and Halsey's (1977) edited volume traces the development of human capital theory in five years, from the early optimisim about its economic returns to a strong critique of its efficacy in underdeveloped Ghana.

the school as a means of determining who would move into the various post-compulsory options of academic preparation, vocational and technical type training, or employment. In the process the schools, and individuals achievement in them, helped to justify this sorting process and the subsequent implications for students occupational paths, aided by claims that this was also the most efficient means of supporting national economic development. The early evidence from Cuba suggests that its model of school education was based on fundamentally similar goals. These objectives are interpreted as an extension of the world-system, liberal and geocultural premises of the expansion and its objectives.

This influence can be seen in the basic structures of the model of schooling established. That is, six years of common (and at this point compulsory) primary, followed by three years of common 'basic' secondary school education, with alternative options then for a further three years of specialised "vocational, professional, superior or pre-university" education (Gobierno Revolucionario 1960, p. 32). This specialised component took place in "trade schools; agricultural and industrial schools; schools for primary teacher training; and pre-university institutes" (Gobierno Revolucionario 1960, p. 40).[20] It should be noted that from this early period onwards, Cuba's reformed national system provided multiple and often non-conventional avenues into the (upper high school) pre-university institutes and then University.[21] The similarities with the models and underlying premises of core states within the capitalist world-economy, however, were set in place (see Connell 1980; Phillips 1975).

[20] The term 'school for primary teacher training' is used for the Spanish *escuela de maestros primarios*, since different types of secondary schools, later called pedagogical schools and institutes, were used to train primary and secondary teachers.

[21] For example, although offering several specialised types corresponding to basic secondary level in this early stage, such as that provided in Agricultural or Technical schools, these schools provided a potential pathway into the pre-university institutes. Further, they offered subsequent entry into Technical and agricultural institutes, which in turn held opportunities for later entry into University. In addition, entry into pre-university insitutes was a possibility for those over eighteen years of age, via a general examination (Gobierno Revolucionario, 1960, pp. 41-45). This was a constant feature of the Cuban system.

As with questions of schools socialising state citizens and contributing to state formation, the government publicly accepted and endorsed ideas of economic development being directly linked to the mass expansion of school education. The inherited shortages of schools was thus presented in 1960 as being:

> incompatible with the successful realisation of the Agrarian Reform, plans for the Industrialisation of the country and, in general, the orientations followed by the Revolutionary Government (Gobierno Revolucionario 1960, p. 23).

The compatibility of the objectives was clear. Secondary schools would raise students' national consciousness and sense of revolutionary duty, which as expressed is Law 680 included promoting their "vocational search and orientation" (Gobierno Revolucionario 1960, p. 39). Law 680 also announced that the technical, agricultural, and industrial schools would be built, and hence their enrolments made, in accordance with "the necessities of the [planned] industrialisation of the country," while trade schools were set up which could offer primary level education to workers without preventing them from continuing their work (Gobierno Revolucionario 1960, p. 46).

The government's legitimacy rested in part on its plans (and their success) to break the structural problems of economic development that perpetuated Cuba's underdevelopment. The goal was to achieve rapid national economic growth, industrialisation and diversification that would in turn benefit the whole nation. Such a response was reinforced by the prevailing logic of the 'developed' core states, and the broader world-system, that every independent and sovereign nation-state had the capacity to more or less emulate the 'advanced' core states and achieve modernisation and development. Hence it is not surprising to see the Ministry of Education presenting the roles and responsibilities of school education as being directly linked to the primary task of 'catch-up' style development. The Ministry of Education asserted that the Revolution "must train in the shortest possible time the future constructors and directors of the country" (MINED 1960, p. 49), such that school education had to fall into line. If indeed the revolutionary project was primarily an alternative strategy for development, as Wallerstein's (1995b) perspective suggests, directing school education to "the current necessities of Cuban society" (MINED 1960, p. 51) and strategies to overcome "the

socioeconomic reality of a sub-industrialised country" (MINED 1960, p. 65) logically follow.

Politicised economic objectives for schools

The basis of a world-system influence impacting on school education policy in Cuba, in a way that policies for achieving development were stressed in the national and world-system historical context and processes of policy formulation, emerges from the early evidence. These schools were to produce socialised citizens ready to conform to the rules and norms of the new society and its revolutionary project, and functionally take part in the program of national economic development. This was to achieved via a model of universal education in which individual students were able to develop and extend their capacities, attitudes, habits and abilities (Gobierno Revolucionario 1960, p. 47). Any pulling of school education in multiple directions, is consistent with analyses of the broader political direction of the Revolution at this time.[22] Any such ambiguity, however, was apparently not officially acknowledged as the basic principles of school education were established as: the explicit politicisation for (revolutionary state) citizenship; and the preparation of labour for economic development plans and strategies. Such principles, and the whole development project, support a world-systems perspective in which these constitute part of the system's geoculture of development, as states attempt to improve their location within the hierarchy of the capitalist world-economy.

The early laws on school education further support this framework by presenting a major part of the revolutionary citizens' consciousness as being an internalised understanding of, and commitment to, national economic strategies and goals. This

[22] For example: Mesa-Lago (1978) observes that the first year of the Revolution "lacked a defined ideology," amidst a mixture of "statist, populist, antimarket, consumptionist, and nationalistic tendencies" (p. 5); Perez-Stable (1993) notes the prevalence of broad-based, multi-class support for Fidel and the revolutionary government into 1960 with liberal reformers and the "progressive" industrialists / bourgeoisie still included in official rhetoric as a part of the process (pp. 61-71); and although Rodríguez García (1990) sets the early period in a teleological analysis, sharpening the class conflict for the future socialist transition, he too notes that the socialisation of the means of production remained insignificant until the latter part of 1960 (p. 33).

involved a commitment by students and citizens to disciplined, hard work. The framework for future reforms constructed at the time emphasised this combination. For example, the Ministry of Education characterised the political education of the youth as involving their acquiring "reverence towards work .. [and] ... devotion to the common good" (MINED 1960, p. 59).

In underdeveloped, revolutionary Cuba, the system of universal secondary school education aimed to enhance the integral development of individuals and train them to contribute positively to the economic development and modernisation of the country. Citizenship and politicisation meant active support for these goals being instilled in students, ready to accept their role in the broader national project. Finally, in support of the world-systems perspective, this was premised on a faith in the scientific and technological revolutions, once rationally applied, to facilitate rapid 'progress' and development of the country. This is evident in the MINED (1960) idea that school education would help the population to "understand and dominate nature in order to put it to its service ... to the service of humankind" (p. 73).[23]

1961 and the socialist character of the Revolution

Rodríguez García (1990) describes the transition of Cuba's Revolution from a popular-democratic to socialist stage as beginning in October of 1960 with the "anti-capitalist nationalisations" of major industries and property holdings (p. 55). He details the expropriation by the state of banks and large Cuban owned companies, amounting to "the main part of industry" (p. 55). On top of the Urban Reform Law of the same year, he concludes that together these events mark the basis of the Revolution's socialist transformation (Rodríguez García 1990, p. 57). These actions followed a range of radical economic measures over the preceding 22 months, including: state intervention to massively reduce rents, electricity and telephone tariffs; a far reaching agrarian

[23] Wallerstein (1995a) describes this faith in scientific and technical progress as one of the main worldviews shared by liberalism and Marxism: "faith in the validity of scientific knowledge … as the only rational basis of technological improvement … [and belief that] … human progress was both inevitable and desirable" (p. 49).

reform; the confiscation of the United Fruit Company lands; and a government decision in July of 1960 granting the President power to nationalise North American properties on the island (Rodríguez García 1990, pp. 40-42). However, it was not until April 1961 that Fidel, in an official speech, described the Cuban process as a "socialist revolution" (in Brundenius 1984, p. 45).[24]

Three significant events occurred with respect to the analysis of school education, soon after Fidel's official "declaration of socialist faith" in April 1961 (Mesa-Lago 1978, p. 5). In all of these, the identified broad trend of politicised secondary school education for economic development was apparent. Firstly, in June the Ministry of Education made a report to UNESCO that directly and implicitly expressed these multiple objectives and influences over national educational policy (MINED 1961a). The following month, all school education was nationalised in line with the socialist politics and ideology now officially embraced. Thirdly, in August an extended meeting and *charla* (discussion), between senior MINED personal, characterised well the multiple influences on school education and their articulation in the national historical context (MINED 1961b).

Like the official adoption of a socialist course by the revolutionary government, these events occurred in a context of domestic economic, social and political upheaval. By 1961 there were severe shortages of goods, to the extent that the government was forced to begin rationing some consumer goods in April, and basic food stuffs three months later (Castro 1961d, p. 8; Matthews 1975, p. 167). Despite, and perhaps in part because of, the potential political damage these conditions could produce, optimism amongst the island's economic planners within different Ministries remained extraordinarily high (see Brundenius 1984). At a national conference on production held

[24] For more details on the gradual drift towards socialism, see Brundenius (1984); Perez-Stable (1993); and Mesa-Lago (1978); all of which broadly confirm Rodríguez García's thesis that by October 1960, well before the official declaration, the Revolution was indeed establishing a *socialist* or at least *socialised* economic model. See also Anderson (1997) who details the extent to which people in the leadership other than Fidel, particularly Che Guevara, were pushing for socialism long before this date. He cites Che telling a friend in July of 1960 that he hoped to "transform this country into a socialist state" by August, but that he was "still trying to convince" Fidel (p. 476).

in August of 1961, in which the leadership and key personnel were present, details of the economic problems were discussed and debated. Analyses ranged from the National Institute of Agrarian Reform's (INRA) Santos-Rios accusation that sellers were proclaiming shortages when they did not exist, to Che Guevara's call for the full and open, public debate of what he identified as serious planning errors, so as to avoid their repetition (in Boti 1961, pp. 61-2). Despite the seriousness of the problems, the head of the Central Planning Board (JUCEPLAN – *Junta Central de Planificación*) Regino Boti concluded that Cuba's economy would grow at an annual rate of 10 to 15.5% over 1962-65, by which time the island would emerge as "the most industrialised country in Latin America" (Boti 1961, p. 55).[25] Che Guevara displayed similar optimism, telling the Organisation of American States (OAS) in August of 1961:

> What does Cuba expect in 1980? Well, a net income per capita of some $3,000, or more than the actual per capita income of the United States. And if you do not believe me, all right. We are here to challenge you, gentlemen. If you just leave us in peace, if you let us develop and in twenty years let us come back, we shall see if the chant of the siren was that of Revolutionary Cuba or not. But we announce, responsibly, this annual growth rate [of 10%-15%] (in Brundenius 1984, p. 48).

There was therefore a climate of serious economic problems with vigorously optimistic official statements and projections for their rapid solution, projections of a popular rebel government embarking on a project of rationally planned, socialist, economic and social development. Centralised national economic planning had begun in 1961 for the following year, and Fidel added to the presentation of a bright economic future, citing a projected figure for GDP in 1962 that was 65% greater than that of 1958 (Castro 1961a, p. 10).[26] Fidel foreshadowed massive investments in industrial and other economic projects, and the prospect of Cubans' standard of living doubling every 7 to 8

[25] The document from this meeting lists shortages, bottlenecks and other problems in numerous industries, as well as specific shortages in a range of staple goods like rice, beans, tomatoes and chickens, these being acknowledged by the participants as "products almost essential for life" (Boti 1961, p. 61).

[26] GDP used here for the Spanish *PIB - Producto Interno Bruto*.

years via an annual growth rate of 13%. He stressed that this vision of material abundance, achievable in the foreseeable future, was contingent on the continued lifting of production and labour productivity (Castro 1961a, p. 20). In economic crisis the socialist project, perhaps even more so, centred around a program for rapid economic expansion and development. This is not to imply that the socialist project was entirely limited to the question of economic development, but to emphasise that this continued to be a central official objective of the revolutionary governmentinto the official transition to socialism.

Increased levels of consumption, seemingly without limit, continued and were extended as central policy goals, to which secondary school education was increasingly linked. Although hopes for this rapid expansion were sustained, at least in official circles, success was increasingly presented as resting on the capacity of the population to work hard and efficiently, with a revolutionary socialist consciousness of the collective and social good this work brought. Schools were to form this consciousness, and provide the enhanced skills and knowledge, within identified priority areas, this also seen as a requisite for the central goals. In this way, secondary schools were given significant responsibility for the success of the socialist development project, this in turn locking the schools in to the world-system worldview or geoculture of sovereign, national development and modernisation.

Secondary schools and Cuban socialist politics-ideology

In this context the Ministry of Education made its report to UNESCO in June of 1961, outlining a vision of secondary school education to meet the country's socioeconomic and socialist political trajectory. The political commitment to universal education was demonstrated by reference to the popular literacy campaign then under way, and some forty thousand scholarships being provided in 1961 for rural students to attend secondary schools (MINED 1961a, p. 9). The Ministry also expressed the socialist political objectives in strong terms, through a stated commitment to the constant revision of subjects and their content in accordance with the changed social

and material needs of revolutionary Cuba, and the first attempts to organise students into mass political organisations (MINED 1961a, pp. 10 and 15).[27] A national government printing house and publisher was established to produce school texts, and tertiary level Pedagogical institutes (ISPs - *Instituto Superior Pedagógico*) set up to train new (and provide in-service training for existing) teachers. The training included inculcating teachers with a correct socialist political orientation (MINED 1961a, pp. 13-15). The government's commitment to universal (and in the future compulsory) primary and basic secondary education was stressed in the UNESCO document, with facilities to provide a full six year primary education for all to be in place by the following year, and sufficient basic secondary schools to ready for all those finishing primary by 1966 .

On one level then, documents like this clearly suggest that school education was being revolutionised in Cuba, as a strategic force in the formation of a socialist, and potentially anti-capitalist world-system, citizenry. Again the potential for a unique approach to develop within such a role for the institution of the school follows. Within these socialist political expressions there were also numerous references to the country's economic plans, and the role for secondary school education in meeting these. In particular, MINED (1961a) described the establishment of JUCEPLAN - "the top national planning organisation," and its foreshadowed extensive planning" which would "augment and diversify agricultural production, open new export markets and industrialise the country" (p. 3). This process, MINED (1961a) added, would create the conditions to satisfy the population's needs for "food, housing, health, work, education and recreation" (p. 3). The role of the secondary school in realising this future was emphasised, on this occasion in terms of it providing "enough intermediate technical instruction facilities to cover the requirements for the economic development of Cuba" (MINED 1961a, p. 4).

[27] At this time these organisations were the "Pioneers" *(Pioneros)* for primary age students, and the "Association of Rebel Youth" *(AJR - Asociación de Jovenes Rebeldes)* for secondary age students. The AJR was to later become the still operating UJC - Young Communists Union (*Unión de Jovenes Comunistas)*.

The following month the government announced the nationalisation of education. The state's toleration of private religious schools was unlikely given the socialist transition, and the anti-communist activities of the Catholic Church in particular. Their nationalisation was presented in terms of: guaranteeing the right of all citizens to receive school education through a single and free public system; ending the exploitation of teachers; ending anti-revolutionary propaganda emanating from some private schools; and ensuring unified and coherent central control over all schooling (Gobierno Revolucionario 1961, pp. 1-2). In the context of the extensive economic planning, and envisaged contribution of state directed education to achieving positive economic outcomes, nationalisation would clearly facilitate these plans. That is, a step towards bringing all schools firmly into the socialist project. No doubt the nationalisation effectively controlled this source of potential political opposition, and ensured that all students passed through the state system with its politicised citizenship objectives. It also, however, created a single, national system that "fully responds to the cultural, technical and social necessities that the development of the nation imposes" (Gobierno Revolucionario 1961, p. 1). Such a system was clearly better placed for the task of promoting specific vocations and training personnel for them, in accordance with the central economic plans.

Cuba's political alignment, and details of its model and strategies for building socialism, were unclear in mid-1961. Rodríguez García (1990) cites early economic links with the Soviet Union, but adds that these lacked coherency and were more a matter of contributing to the economic survival of the Revolution, rather than constituting a definitive trade and political relationship (pp. 33-35). Even in these terms the USSR had quickly come to account for some 15.3% of Cuba's foreign trade, a significant figure albeit well short of its later dominance (Rodríguez García 1990, p. 50).

Anderson (1997) documents a greater degree of Soviet links in these early years than for example, Rodríguez García (1990), presenting this as being promoted by Che Guevara to replace lost export markets as the United States blockaded the island and provide military security in the event of U.S. invasion. Contradictory signs from the Cuban government would emerge. For example, at the same time that Fidel was

acknowledging Khrushchev's political support against U.S. terrorist attacks on the island (Castro 1961b), President Dorticós was returning from official visits to China and Czechoslovakia which, despite China's bitter divisions with the Soviet Union, were described as "Friendly Countries."[28] Some attempt to define a Cuban style of socialism, not overly dependent on any single socialist or capitalist state, was seemingly still being pursued.

Thus while no particular socialist or Marxist political orthodoxy was put forward, a general public consensus on the program of the socialist state was evident. This included: accelerated industrialisation through the development of heavy industry; agricultural diversification; and import substitution through greater and more diversified domestic production (Rodríguez García 1990, p. 81). These objectives were accepted as the basis for both national economic independence, development, and the material basis for the building of socialism. The discussion of MINED (1961b) personnel reflected this consensus, expressing ideas for the reconstruction of education within the parameters of its contribution to the program for economic development, and the particularly Cuban, revolutionary, socialist political project.

Raul Gutierrez, for example, referred to the need to radically change the content of history teaching away from inherited imperialist interpretations, and combat the negative ideological impact of the broader inherited system by integrating adults and workers into a range of re-training and further educational courses (in MINED 1961b, p. RG. 7).[29] Fermin Portilla recommended that wage differentials in education be abandoned (in MINED 1961b, p. FP. 8), and that while educational planning was directly linked to economic planning, it should be pursued with the active participation

[28] This description as *Paises Amigos* (Fridenly Countries) appearing on the cover of *Bohemia*, n. 42, 1961.

[29] This particular MINED (1961b) document, archived in Cuba's 'Centre for Educational Documents and Information' (*Centro de Documentación e Información Pedagógica*), contains the interventions of some sixteen MINED personnel, and restarts the page numbering for each one of these. Given that the individual interventions lacked specific titles, as parts of the whole MINED document, I have included the initials of the person with the page numbers for the specific references to different participants sections of the document. In each case the name of the author is noted in the text, with their corresponding initials in the cited page numbers.

of workers and the general public rather than just with bureaucrats from the Ministry (in MINED 1961b, p. FP. 4). García Gallo stressed the need for all teachers to assimilate the new socialist ideology (in MINED 1961b, pp. GG.1-12).

This high level discussion demonstrates again the acceptance of the concept of school education socialising politically loyal citizens, now articulated as involving their assimilation of socialist politics and ideology, converting these into personal convictions. Similarly, schools were to legitimise the corresponding revolutionary political structures, and actively support and work with plans for national economic development. A critique of the old methods of assessment and their inherent discrimination against certain social groups was again raised, but the importance of formal assessment simultaneously continued to be affirmed by endorsing the *ficha acumulativa* (accumulative school record) which students would carry with them throughout their educational life (in MINED 1961b, pp. EF. 3-7).[30] Elena Freire also asserted the value of the *ficha acumulativa* for the correct vocational orientation of students, according to their evaluated and recorded individual abilities, and the identified needs. That is, a means for educators to better "make the selections" when "we have to decide who is going to enter" the various types of secondary institution (in MINED 1961b, pp. EF. 8-9). Gutierrez added that increasing the technical level of current and future workers, in cooperation with the Ministries of Work and Industry, was a central policy of MINED, to resolve "all types of economic, social and political problems," as every Cuban citizen became "technically capable" (in MINED 1961b, RG. 13). Finally, Portilla stressed that current and future educational planning was just "one aspect ... within the concept of planning for economic development" (in MINED 1961b, p. FP. 3).

[30] The new system was to avoid the old failings by virtue of it being based in a more equalised and hence truly meritocratic social system, and by explicitly acknowledging disadvantages stemming from socioeconomic status and taking compensatory measures. The concept of student assessment or evaluation, however, remained as a means of identifying students' strengths and weaknesses (MINED 1961b, pp. EF. 7-9).

National education reconstruction: The first three years

The first three years of Cuba's popular Revolution, with the latter part being under the socialist transition, produced unprecedented results in terms of the massive expansion of public education and equalisation of its provision. In a few short and difficult years, literally thousands of new schools had been established, tens of thousands of teachers trained, education budgets increased, state scholarships for isolated and socioeconomically disadvantaged students provided, and facilities for adult, worker and farmer education established.[31] Illiteracy had been effectively eliminated in just one year, through the unprecedented mobilisation of hundreds of thousands of people throughout the country, bringing literacy skills and revolutionary politics to all parts of the island.[32] In addition, subjects and their content were under revision to promote a socialist outlook and set of values and attitudes in students, who were already being organised into political organisations.

The beginnings of the reconstruction of school education in Cuba must be viewed in the historical context of the revolutionary changes being established, these in turn mediating and helping to shape the reforms and their public presentation. A politicised school would help to provide stability for the rebel government as it sought to put its socialist program into action. It can clearly be seen how in these first few years Cuba's 'underdevelopment' led to objectives and strategies designed to overcome this, and facilitate rapid or 'catch-up' development on the island, being stressed. This whole context was inextricably related to the structural arrangements and geoculture of the modern world-system at the time. That is, a broad national strategy linked to a larger understanding of the national and international economic framework, all of which favoured policies for fast-track industrialisation, export diversification and import substitution, as a means of breaking the cycle of underdevelopment. The role of the

[31] For details see Leiner (1985) and Varela Hernández et al. (1995).

[32] Within the MINED (1961b) discussion Armando Hart, then Minister of Culture, foreshadowed the official announcement to be made the following day by Fidel that the Literacy Campaign had achieved 97.4% literacy on the island (p. AH-2). For a concise account of the Literacy Campaign see MacDonald (1985).

school in this process was a significant part of the context, running alongside and within the liberal, national political and socialist, educational objectives.

Within this same context, the idea that school education could simultaneously function to legitimise and promote an anti-capitalist or socialist ideology and politics, and efficiently contribute to national economic plans and development, was clearly a basic premise on which the new system was to be built. Investing in and training human capital for future national economic rewards was common to capitalist and planned socialist economies, and arguably stronger in the latter as the socialist or Marxist-Leninist variant of liberalism emphasised rational scientific planning and placed the perceived broader social good of a functionalist system ahead of individual desires (see for example Tomiak 1985). School education to support the national political economy, which shared goals common to the world-system, thus characterised these early changes.

EDUCATION AND THE GREAT DEBATE, 1962-1965

To this point I have raised the possibility of radical change to secondary schools in Cuba, noting in particular the formal acknowledgment and pursuit of their political role socialising students for the revolutionary and socialist state and society. With the official socialist nature of the Revolution just beginning historically, this potential remained. Strong goals of national economic development, and the preparation of trained and politically motivated workers through the schools to achieve these goals, were also identified.

In these early stages a guided public debate emerged, centring on strategies to realise the already agreed goals of independent national economic development, as an integral part of the Cuban socialist project. Debate took place in the context of Cuba forging its own, authentic, socialist path, aided by the patriotic sentiments of sovereign, national independence that had helped the revolutionary government to achieve and consolidate state power. For educational policy, Che Guevara's utopian vision of the *hombre nuevo* ('new socialist citizen') emerging from schools was incorporated as a central objective in this period, and other political reforms were extended, such as the revision and

replacement of curriculum content. The dynamic of potentially radical change, alongside more conventional reforms based in the essential objectives of school education, continued. School education clearly responded to the Revolution's socialist objectives and the goal of building Cuban socialism and communism. Other reforms extended the earlier trends of the school responding to national economic priorities. The result was the consolidation of socialist political and economic development objectives formally underlining the reconstruction and expansion of school education.

The terms of the debate

A favourable climate for public debate was endorsed by Fidel himself in discussions with artists, writers, academics and other intellectuals held in the University of Havana in June of 1961. Fidel affirmed that the Revolution supported and defended freedom of expression within its own boundaries, and that only those who were irreconcilably against the Revolution had anything to fear (Castro 1961c). At this meeting Fidel outlined the essential framework within which any serious political debate would take place:

> within the Revolution, everything; against the Revolution, no rights ... This is the general principal for all citizens. It is a fundamental principle of the Revolution (cited in Portuondo 1964, p. 61).

Vigorous argument was to be encouraged at this critical time, the only restriction being that all participants accept as non-negotiable the fundamental objective of constructing socialism in Cuba. At the same time Fidel secured greater political control by removing in 1962 the head of the pro-Soviet Socialist Party (PSP), Anibal Escalante, who had promoted a sectarian and pro-Moscow road for Cuban socialism (see Castro 1962).[33] Thus the debate over strategies, with agreement on key questions, occurred at the same time that the central leadership was strengthening its position and authority on questions of major policy. Fidel oversaw the transformation of the broad based group, the

[33] Escalante's sectarianism included stacking government and management positions with PSP members committed to its pro-Soviet policies (see Anderson 1997, p. 541).

'Integrated Revolutionary Organisations' (ORI), into the 'United Party of Socialist Revolution' (PURS – *Partido Unido de Revolución Socialista*), with himself the head of the new party, Prime Minister, and the unquestioned highest political authority on the island.[34]

This is not to suggest that significant public discussion and debate did not take place, but to stress the conditions in which it was framed. The formal debate was carried out through the mainstream media and in specialised journals, with polemics on the most efficient way to construct a Cuban socialism capable of resolving the complex economic problems confronted by the state. Brundenius (1984) affirms that the whole debate arose primarily from "the commodity shortages that had arisen in 1961 and intensified in the following two years" (p. 51). Clearly the mixture of the raised expectations of the population and the rationing and shortages of basic foodstuffs and consumer goods would be politically damaging, and had to be addressed as a matter of priority. Thus, just as the optimistic assessments of the leadership on resolving these problems sought, in part, to contain potential damage and / or maintain public commitment to the Revolution, the debate was similarly a public response by the government to the problems.

Despite, therefore, the emphasis placed on the issue of moral versus material incentives in some accounts (for example Carnoy 1990; Fitzgerald 1990), it should be stressed that questions like this were consistently directed towards finding the most efficient and immediate way of increasing production and productivity rates.[35] That is, the emergence of a Guevarist inspired idealist model within the radical experiment, was no less motivated by underlying problems of production, trade, and domestic industry and consumption, than the alternative of the day or the later dogmatic adoption of an

[34] The ORI integrated the July 26 Movement, PSP, Directorio Revolucionario, and other smaller groups participating in the Revolution. It was this organisation that Escalante and the PSP tried to dominate, hence their purge coincided with its replacement by the PURS.

[35] See for example, Guevara's (1964a) argument in which he asserted that his Budgetary System would better "raise the efficiency of the Socialist State's economic management" (p. 8). The broad argument made by Guevara is along economic efficiency lines. Secondary analyses such Brundenius and Zimbalist (1990), Brundenius (1984), and Mesa-Lago (1978), support this interpretation.

orthodox Soviet model in the 1970s. The period was, however, quite distinct in terms of the space provided for vigorous and critical debate around the socialist project, and according to the recent analysis of an active participant, it was the most stimulating and politically exciting time of the Revolution (see Martínez Heredia 1995a).

Secondary analyses suggest a consensus over the subject of the debate. That is, the appropriate strategies and mix of policies required to achieve the identified targets and rates of economic growth necessary for the island's rapid development and industrialisation, as a prerequisite for building socialism and communism (see Pérez-Stable 1993a; Brundenius and Zimbalist 1990; 1984; Fitzgerald 1990; Mesa-Lago and Zephirin 1971; 1978). Rodríguez García's (1990) analysis from within Cuba, like much Cuban historiography post-1970, emphasises unity and the teleological inevitability over any significant debate or division.[36] Martínez Heredia's (1995) critical analysis, on the other hand, reminds the reader that the context of the first half of the 1960s did include an open and public consideration of and debate about the multiple currents of Marxist thought from different socialist countries. Even this recent work, however, implicitly confirms the underlying agreement on the national goals of rapid economic development, via industrialisation, modernised production, heightened productivity, and ultimately increased national wealth through this production and trade.

Two major positions are generally acknowledged within the debate, stemming from groups led by high profile members of the revolutionary government. The first of these was led by Che Guevara, advocating mobilisations, voluntary work and appealing to people's political consciousness, so as to exert their collective will over the national economy and rapidly achieve socialism and communism simultaneously. Guevara proposed a Chinese style utopian vision which rejected any role for the (capitalist) law of value, advocating: the centralised budgetary system of financing and controlling state enterprises; the steady replacement of material with moral incentives; and the gradual eradication of money altogether as all workers came to feel a part of the single, great

[36] For some elaboration of this problem from within Cuba see Santana-Castillo (1995), Martínez Heredia (1995) and Alonso-Tejada, (1995).

factory that was the socialist state (Guevara 1964a, p. 21).[37] Placing such emphasis on people's consciousness and moral sense of duty to achieve the rapid industrialisation, Guevara necessarily viewed (political) education, and support for revolutionary movements in Latin America, as essential to his strategy. The project for the new socialist citizen was therefore an essential part of his economic thinking.

The alternative group centred around the then Minister for foreign trade, Alberto Mora and the head of the powerful INRA, Carlos Rafael-Rodríguez (see Brundenius 1984; Mesa-Lago 1978). This group opposed Guevara's utopian model, advocating the continued use of the law of value, emphasis on material incentives and work quotas, and self-financing rather than centralised budgeting for state enterprises. Mesa-Lago (1978) claims that this side of the debate was strongly influenced by Soviet thinking and models of economic planning, emphasising that Rafael-Rodríguez was a former leader of the old PSP that maintained long standing and close ties to the CPSU. The groups use of the work of The Soviet Union's Liberman, and pro-Soviet Charles Bettelheim, further support this interpretation.

Critically for the analysis of secondary school education, underlying and throughought this 'great debate' there was general agreement with respect to the pre-eminence of national economic development goals. There was no perceived contradiction between Guevara's vision of schools radically raising the political consciousness of the population in a massive way, and functionally preparing qualified workers to realise economic plans. These were indeed consistent with each other in the historical context. Hence for the period of the debate reforms directed to students' socialist political education, and others directed to the human capital demands of the development project, are identified. These objectives reinforced each other in formal

[37] Mesa-Lago (1978) identifies the Chinese Communist influence on Che Guevara based on his belief in Cuba's ability to make a 'leap' forwards and almost immediately beging building the utopian communist society. Brundenius (1984) notes that there is no evidence of a direct Chinese influence, and that Mesa-Lago makes this allusion due to the context of debate in China at the time on the role of profits and moral incentives in the aftermath of the 'Great Leap Forward' in China (p. 53). Guevara's distaste for money and financial incentives was apparent in his time as President of the National Bank, in which his signature appeared on banknotes simply as "Che." The colloquial word *che* was the Argentinian equivalent of the Australian term 'mate,' was used to signal his disrespect for the notes and all that they represented.

policy. This is followed by a preliminary assessment of a world-systems geocultural approach's capacity to make sense of this trend. Before moving to these, however, an overview of the economic strategy that emerged in the context is made, given its importance in reinforcing the directions advanced for secondary school education.

Underlying economic crisis

As has been outlined above, on achieving power the Rebels sought rapid economic expansion in line with the development perspective of the Revolution. As expressed by Matthews (1975), the solutions appeared straight forward:

> There had been a sugar economy; let us diversify agriculture. There was complete dependence on the United States; let us achieve economic independence of the Americans. The economy was largely agrarian; let us industrialize. The land was heavily committed to large plantations with much idle land; let us make an agrarian reform and put all the land to work. There had been great unemployment and underemployment; let us achieve full employment (p. 157).

Armed with victorious revolutionary fervour and enthusiasm, and the associated optimistic economic forecasts of planners, the climate suggested that any national or international problems could be overcome through the exerted application of this collective revolutionary will. The shortages and problems of 1961-1962 no doubt tempered this popular enthusiasm.[38] Just as these were a contributing factor behind the debate, some of its first expressions were in the form acknowledgments from the central leadership of mistakes made in both planning and practice. The most frank admissions came from Che Guevara, observing in 1962 that the economic plan for the previous year had been "a bureaucratic plan, isolated from the structural framework and unlinked to reality," amounting in practice to no more than an expression of "our best wishes" (Guevara 1962, p. 32).

[38] See Bunck (1994) and Eckstein (1993) for some details of the ways in which popular *discontent* manifest itself in this early period, and at other times of economic hardship.

Despite the self criticism and official acknowledgment of the serious problems in the national economy, a belief in rational scientific planning, and humankind's ability to exert its reason and will over nature and achieve the material outcomes, prevailed. In 1961 Fidel assured the population that the rationing of basic foodstuffs was only a temporary measure, implying that the realisation of socialist material abundance was indeed still on the agenda, the timeframe for its achievement simply being extended (Castro 1961d, p. 8). Perhaps agricultural diversification would have to wait as sugar was used to finance urban industrialisation, which would in turn bring new domestic production and value added exports that would allow for the gradual de-emphasis of sugar. The official discourse was across both sides of the debate, dominated by expressions of the power of science and technology, if properly harnessed under a system of socialist planning, to carry Cuba out of its underdevelopment and into a modern, egalitarian, communist future. The belief that this could occur within the existing capitalist world-system was similarly implied across the debate.

A shift in national economic policy did occur, but as part of the agreed basis on which the debate took place. Linked to the shortages and need to establish the infrastructure for longer term, sustained increases in national production, the shift endorsed the continued reliance on agricultural commodity production, primarily sugar, for exports and hence a source of finance for domestic economic growth. Industrialisation, import substitution, and the diversification of the national economy and its exports remained central priorities, but were to be achieved more gradually, financed by commodity export income. Fidel made this clear in 1963 stating that:

> agriculture will be the base of our economy in this decade, and perhaps also through the next decade, because our development is dependent on our agriculture (Castro 1963, p. 9).

The ultimate expression of this revised line of economic thinking came in 1964. Having just returned from the Soviet Union with new agreements for increased sugar sales at higher guaranteed prices, Fidel announced the ten million ton sugar harvest goal for 1970 (see Castro 1964c).

Three major implications of the debate, and the context in which it occurred, emerge as relevant to the analysis of secondary school education. First, the primary goals of the

socialist Revolution were shared by all participants in the debate: accelerated national development via socialist production, productivity and improved terms of trade; and a system of egalitarian socialist distribution of the benefits of this growth. Secondly, the context of actually falling production, exports, and worsening national economic indicators, reinforced the perceived need to quickly find a more sophisticated and efficient means of achieving these goals. Finally, these national conditions were clearly supportive of any attempts to use school education as an instrument in this process.

Reforms for socialist political objectives

The extent to which fundamental or radical reforms to school education were possible within this context cannot be quantified. Significant structural and philosophical changes were initiated, and the prospect of more radical change raised, in for example calls to fully democratise school educational policy and practice, with some moves being made in this direction.[39] Here too the framework for reform prescribed limits on the real decision making power of the population. In 1962, the Minister for Education Armando Hart advocated a balance between mass public participation in policy and its implementation, and centralised, hierarchical responsibility and authority. Hart (1962) expressed revolutionary reservations about formal structures of hierarchical authority, noting that in line with Marxist theory the leadership was committed to the liquidation of the state in the shortest time possible. This was conditioned, however, by an acknowledgment that a full and complex state apparatus had been constructed and, until the appropriate time for its liquidation arrived, it would need to be respected by the population (pp. 7-8).

Other radical changes in education were initiated in this period, corresponding to Che Guevara's vision of forming the new socialist citizen on a mass scale. This was to be achieved by raising the consciousness of students through collective work and direct

[39] Armando Hart, for example, had also advocated a model of organisation for the whole national system along the lines of the popular and participatory Literacy Campaign (see MINED, 1961b). Municipal Councils had been established to incorporate popular participation in the organisation and planning of school education, along with "popular assemblies" (see MINED, 1962b). As is apparent, however, Hart was soon to move away from these more radical positions.

instruction, to form the subjective human basis of the communist society. Plans for the mass expansion of basic secondary education began, with claims by the Ministry that the old style of teaching, overly reliant on abstract theory and its memorisation by students, had been replaced by a new approach that linked theory to practice, and both of these to productive work (MINED 1962a, p. 1).[40]

The strategic role of the school, socialising students to participate in and contribute to the creation of the new communist society, remained a central component of official policy. Thus Hart (1962) stressed the crucial role of the school in the political formation of the youth:

> I sincerely believe ... that the environment that we create in each school will decide whether an individual that is formed in the school moves towards Marxism-Leninism or counter-revolution... this is a fundamental truth (Hart 1962, p. 24).

The reliance on the school to guarantee the continuity of the revolutionary project is clear, extending its role socialising citizens for the socialist state. Che Guevara similarly endorsed this position, citing the need to target and reverse the attitudes and values instilled and reinforced in students by schools in capitalist societies (see below).

In 1963 the Ministry of Education released a detailed program of activities for the basic secondary school, which systematically outlined a course of study to promote "the educational, social and political development of the youth" (MINED 1963, p. 3). Units included one entitled, "Study more in order to better serve our socialist homeland," for which the Ministry provided an extensive list of required readings (MINED 1963, p. 7). Other units listed questions to be raised by teachers and discussed by students, for example "Why does the working class need the leadership of a Marxist-Leninist party?"

[40] This was the precursor to the future entrenchment of the principle of *estudio-trabajo* (work-study), seen as a means of achieving ideological / political objectives by having students engage in productive work that was of social value, as well as being of direct economic assistance to the governments economic plans. See chapter II for a full discussion of this principle and its development in Cuba.

(MINED 1963, p. 59).[41] The subject content was overtly politicised to actively support and promote the Revolution, its leadership, the emerging socialist institutions, and the official socialist ideology put forward by the PURS. The attempt to provide all students with knowledge of history, politics, and economics from a Marxist-Leninist perspective, to form a socialist worldview, was therefore extended.

By February of 1965 the Ministry of Education claimed that the first steps had been completed towards the necessary politicisation of the school, and ideological orientation of all curriculum content, towards unified sociopolitical objectives (MINED 1965). Although no evidence to support this claim was detailed by the Ministry in this statement, it provides evidence that such goals continued as official and central objectives. The national meeting of Ministry functionaries and personnel in the same year went further, asserting that Marxist-Leninist unity in education had already been achieved, and recommending that all teachers be provided with ongoing in-service training to improve their knowledge of Marxist-Leninist ideology, Pavlovian psychology, and dialectical materialism (MINED 1965, p. 2). The Conference envisaged that these measures, along with the general revision of content, would produce an authentic socialist pedagogy, and in turn new socialist citizens. Again, the rhetoric called for this socialist pedagogy with the "active intervention" of students to replace the old style of the teacher-led, memoristic classes (MINED 1965, pp. 3-4).

These reforms came in the context of Che's radical economic planning and the accompanying thesis, *Man and Socialism in Cuba*, with its implications for education. It was here that Guevara (1964b) outlined the need for the *hombre nuevo*, based on the assessment that the efficacy of moral incentives could only be sustained if people's revolutionary consciousness was raised in a meaningful way, and that this could best be achieved through direct education (Guevara 1964b, p. 6). In typical fashion, Che warned against the production of "docile employees of the official line" (Guevara 1964b, p. 10), putting forward the vision of the selfless new socialist citizen prepared to give

[41] "Leadership" is used here for the Spanish *dirección* (direction), better capturing in this context the meaning of the direction of the Party.

everything, with no desire for or expectation of material reward. Such citizens were presented as absolutely essential for Cuba's socialist development project. Thus Che's *hombre nuevo* found a central place in broad national educational policy, and within subsequent specific initiatives.

In addition, the leadership set up a national system of 'Party Schools' ('Schools of Revolutionary Instruction' or EIRs – *Escuelas de Instrucción Revolucionaria*), which were to train the new intelligentsia and political cadre who would in turn take care of "the ideological formation of the rest of the people" (in Bunck 1994, p. 27). Bunck (1994) notes that as early as 1963 some nine national, seven provincial and two hundred local EIRs were operational, providing political instruction for thousands of future leaders. When the formal teaching of Marxism-Leninism and departments of scientific socialism were set up within schools and Universities in the 1970s, the heads of the departments were required to have passed through the EIRs. The Party schools were also built with the idea of improving the ideological formation of the future teachers of Marxism - Leninism.

In revolutionary Cuba, as in any state, there was not necessarily a correspondence between the rhetoric of official policy and actual practice. Thus where Bunck (1994), for example, tends to accept at face value an official declaration of the need to orient all education according to Marxism-Leninism, as evidence of the transformation of formal education, a deeper analysis is required. I have given some indication of how the political objectives connected with more pragmatic national economic concerns. Hence the need to consider 'formal' or 'official' policy objectives. The structures, desired outcomes, and functions of school education continued to be influenced by the national political economy and the broader development agenda, which in turn shaped the socialist schools being developed.

Socialist secondary school education for national economic development

Alongside the more overt socialist political reforms, others continued to directly support the strategies and goals national economic development. I have argued that the political and economic based reforms were presented as separate, but compatible with each other and the underlying socioeconomic project. In this period of debate, these

separate but compatible reforms merged with a clear emphasis on the economic functions of the secondary school, this coming to define its political role. Development was entrenched as a key premise of Cuba's revolutionary politics, even as difficulties forced the reassessment of the idealistic expectations of the first few years. In this context, secondary schools more explicit link to the identified requirements of economic plans and strategies was strengthened.

In presenting the economic plan for 1962 Fidel casually observed that government's provision of large numbers of scholarships for secondary students was to some degree motivated by "the urgent necessity for technicians in all of our economic plans" (Castro 1962, p. 19). In a similar fashion Guevara (1962) made the point that the entire national plan for economic development was dependent not only on students political formation, but also on the "scientific, technological and technical training" of the cadres who would oversee these plans (p. 39). Going further, Guevara (1962) suggested that the Ministry of Industry, for which he was responsible at the time, ought to share responsibility for education given that "all of the work of education is intimately linked to production" (p. 39). In a similar fashion the Ministry of Education announced that the new schools would meet the need for qualified agricultural and industrial workers (MINED 1962a, p. 2), later calling for mass voluntary work by secondary students so as to strictly link study to productive work (MINED 1962b, p. 4). This exemplifies the convergence of political and economic objectives, with students engagement in productive work presented as a major part of their political formation.

Alongside the political units of study, for inclusion in the secondary school, were others aimed at directing students towards specific vocations. One of these, entitled "Exploring our occupational preferences," directed teachers to push students towards those vocations identified as "most necessary to the construction of socialism" at that time (MINED 1963, p. 45). In this way, students were to be encouraged towards specific types of vocational training, through their experience in general (common) school education. Vocational training was to take place, at this time, in polytechnical schools and institutes often directly linked to, or even managed by, specific industries and Ministries other than Education. For example, Kolésnikov (1983) notes that twenty four million pesos were directed towards "agricultural-technological studies" in 1965,

this specialisation alone accounting for some 10% of the total education budget for the year (p. 137).[42] As early as 1961 such Agricultural institutes had been established in four provinces (Kolésnikov 1983, p. 122).

The beginnings of a national system designed to effectively sort students towards academic or vocational studies, and hence specific occupations within these, can thus be seen in these policies and structures. To be sure, the political commitment to a common, basic level of school education for all remained, followed by similarly universal opportunities for further training in identified areas. The structures and official policy, however, began increasingly to articulate the political objectives, specifically students' political formation, in terms of meeting economic development goals.

As has been noted, the period of the debate also marked a shift in the accepted strategy for Cuba's economic development, with a renewed dependence on sugar and agricultural production to finance industrialisation and future economic diversification. Corresponding reforms in schools provide further evidence of these plans' influence on broad school structures and their organisation. For example, the first 'Seminar on the Unity of the National System of Education,' held in February of 1965, committed the Ministry of Education to "strongly accentuate" a vocational orientation towards agriculture to meet "the line of economic development established by the Revolutionary Government" (MINED 1965, p. 4). In the same year, MINED combined with INRA to produce a broad plan for secondary school education's support the planned expansion and modernisation of existing agricultural industries. Agricultural schools and institutes

[42] See MINED (1995) which records the total budget for education in 1965 as 270.2 million pesos. This figure includes all current costs and investments in buildings and infrastructure.

were targeted, with this now accepted as the fundamental basis of the country's national economic development.[43]

Another indicator of the broader world-system influence on this policy can be seen in an article by the senior Cuban economist Miguel Figueras (1965), citing the percentage of the population in OECD countries with degrees in engineering or science as something that Cuba had to achieve within fifteen years (p. 12). Such targets, based on educational qualifications, were apparently accepted in Cuba as being directly related to a nation's capacity for development. Writing about Cuba's economic problems, Figueras (1965) strongly expressed the need to raise enrolments into higher levels of education and reduce dropouts which increased the cost of producing trained graduates (p. 11). Indicative of the extent to which this conception of education had become consolidated within official thinking, Figueras (1965) affirmed:

> The economic progress of a country rests in the knowledge and abilities of its inhabitants, so that you can not propose the study of desired changes in the productive structure without first analysing the possibilities to raise the general level of training ... [hence] ... the vast educational program ... [that will] ... render its fruit in terms of qualified workers? (p. 10)

CONCLUSION:

The first eight years of the revolutionary process in Cuba saw the implementation and extension of some explicitly politicised policies, with formal objectives advocating a national system of public school education that directly supported the revolutionary and socialist transformation of the Cuban state and society. In the context of revolution,

[43] Such emphases took the form of official declarations from leaders like Fidel urging parents and students to pursue the agricultural options in the interests of the Revolution, or moral / political pressure from mass organisations like the UJC promoting students' selection of targeted vocational training as an expression of their revolutionary commitment. The exact title of the joint document was: 'INRA/MINED Plan: Education at the Service of the Scientific-Technological Agricultural Revolution and the Economic Development of Cuba' (*Plan INRA-MINED: La Educación al Servicio de la Revolución Científico-Técnica Agropecuaria y el Desarrollo Económico de Cuba*).

and then the construction of socialism, the major school education reforms included: the nationalisation of all education and rapid expansion of its provision for universal access; the revision of subject content to better reflect and support the revolutionary process; and attempts to implement a 'socialist method' of teaching that was distinctly different from the inherited model of teacher-led, passive student classes. The national historical context simultaneously produced reforms that pragmatically responded to the political economy of the early Revolution, and were directly articulated with the government's plans for national economic expansion. These responses expressed a framework of preparing skilled labour required to achieve the Revolution's socioeconomic goals.

The analysis of the early period of the shift to socialism, and the formal policies, structures and practices in secondary school education emerging in this period, revealed that policies based in political and economic development objectives continued. Support for the socialist state was pursued through the formation in schools of socialist citizens, loyal and ideally committed to the socialist project being advanced by the government. Curriculum content was modified to assist this process, alongside students participation in productive activities and integration into political organisations. The potential support for economic plans provided by secondary schools also continued in this period, articulated as a part of the political formation of students. Thus the assessment and selection of students for post-basic secondary specialisations, targeting identified priority vocational areas such as agriculture and industry, was set in socialist political terms.

The convergence of political-citizenship and functional economic objectives, identified in this chapter, was linked at one level to the broader consensus in Cuba about the primary goals of the revolutionary and socialist project. Thus I emphasised that amidst the debate over the most efficient, and authentically Cuban, revolutionary strategy for socialist construction, there was agreement that the desired outcomes of this project. That is, the achievement of rapid socialist economic and social development, breaking definitively the island's inherited state of economic dependency and underdevelopment. Hence, even Guevara's radical proposal for the immediate and simultaneous construction of socialism and communism, concentrating heavily on raising the political consciousness of the youth and future labour force in schools,

invoked economic goals of increased production and productivity. Workers were to be motivated by communist political convictions rather than individual material rewards, but the basic goal of national economic expansion remained.

In this way, the reconstruction of school education, and the framework in which this occurred, necessarily included the underlying development premises of the revolutionary and socialist project. Secondary school education emerged as a basic right of all citizens on humanitarian and political grounds, and a duty or obligation in the sense that it was seen as an instrument of the government to both promote the consolidation of the socialist revolution and its program, and in turn directly support national economic strategies and planning that constituted a central part of this program. The objectives were often expressed within separate laws and statements, but they were identifiably linked as part of the broader framework of formal school policy.

The result of this process was that, for example, radical socialist political reforms were presented in terms of serving the government's economic plans and objectives, while conversely reforms designed explicitly to directly assist in the national economy and its goals were officially articulated as revolutionary political initiatives. Not only was there underlying agreement about the development goals, but the influence of economic considerations began to influence the rhetoric of socialist pedagogy and education. Clearly then, the early development of secondary school education was influenced by the national political economy. That is, the need for citizens to strengthen the legitimacy of the revolutionary government and state project, and the need for these citizens to have skills relevant to the needs of the national economy and plans for its expansion.

The national context also included a population whose expectations for greatly improved material standards, to be achieved in a matter of years rather than decades, had been raised by the euphoria of the popular liberation and subsequent promises, projections and forecasts by the Revolution's leadership. Regardless of the politics, the potential damage to the legitimacy of the government and its program that shortages of food and other goods might bring meant that, in pragmatic terms, measures to develop the national economy and resolve these problems were reinforced as central to government plans. In turn, the potential role of secondary schools in these plans was

heightened. Thus for example, the period saw schools training more students for agricultural work, in direct response to the government's return to a greater dependence on agricultural commodities (most notably sugar) than initially anticipated, as a strategy to fund a more gradual program of industrialisation and economic diversification. In this respect, some evidence of these domestic influences, explaining the early developments, structure and formal policy of secondary school education, were established.

These domestic conditions, however, did not emerge in isolation. The underdevelopment of the national economy, its reliance on agricultural commodity production and exports and hence dependence on concentrated world markets, were inextricably linked to the capitalist world-economy and the island's location in its periphery. In line with this, I suggested that the identified emphasis on realising national economic development, tied to the legitimacy of the revolutionary government and central to its political program, was at least indirectly shaped by the functioning of the world-economy. Thus, it is possible to argue that the world-system influenced the new governments economic program, which in turn impacted on the intended roles and outcomes of secondary school education.

Additionally, the domestic conditions were influenced by common, world-system level ideas about the potential role of mass, secondary school education in the preparation of citizens for active and productive participation in the workforce. Seeing school education as an investment in developing human capital, with future economic returns, was apparent in core capitalist countries like Britain and the United States, in the thinking of international bodies like UNESCO, and in Soviet Union as the leading power in the socialist alternative.[44] Kolésnikov's (1983) analysis of Cuban education, beyond its emphasis on the disinterested assistance provided by the Soviet Union from the earliest days of the Revolution, concisely expresses the extent to which the Soviet

[44] For thinking within UNESCO on education for development see Robert Cowen (1983). For the Soviet perspective, see for example the Ministry of Education's (MINED) 1972 publication, *Conferencias Sobre Pedagogía Socialista*, which emanated from a three week visit by Soviet functionaries to Cuba and provided a detailed summary of Soviet educational thinking. The dominant theme was by far the use of school education to prepare productive workers.

model of education shared these conceptions with their ideological opponents. Kolésnikov's (1983) sums up the Soviet position as follows:

> The experience of the USSR and other socialist countries demonstrates that an indispensable condition for the economic, scientific-technical and social development of the country, is the guaranteed provision of trained and qualified workers, who form a part of the productive forces, to the national economy (p. 121).

While Kolésnikov (1983) cites some of the ways in which the Soviet Union potentially influenced the early Cuban thinking, the significant point is that the fundamental idea of the school preparing labour required by the national economy was clearly shared by capitalist and socialist countries, as part of the world-systems geoculture of development, and revolutionary and socialist Cuba was no exception.[45]

The depth of this geocultural belief in Cuba was apparent in the general statements and objectives of the government, and specific school educational structures and reforms. Che's new socialist citizens were marked by their preparedness to work hard, and efficiently, for little material reward as part of the national development effort. Fidel attributed insufficient agricultural production to the nation's "backwardness" in science and technology, which he in turn presented as being indicative of the failure of public education to properly serve the needs of economic development (Castro 1964a, p. 63). The capacity of a world-systems geocultural approach to account for this convergence, with respect to the goals, functions and outcomes of secondary school education, emerges from the analysis.

Two main areas in support of a world-systems approach were identified, involving the shared geoculture of development across all states (regardless of their specific forms of political organisation) within the capitalist world-system. First, this ideology or geoculture promoted the idea of all sovereign, formally independent nation-states

[45] Kolésnikov (1983) cites agreements made as early as 1960 for Cuban technicians to be trained in the USSR, and other avenues of influence such as the presence of Soviet Specialists in Cuba providing advice and training Cuban teachers, and joint conferences on socialist education (pp. 131-32).

following similar paths of development, based around industrialisation, modernisation and trade, and viewing 'progress' as desirable, if not inevitable (see Wallerstein 1995a, pp. 49 and 167). That is, the functioning and legitimacy of the capitalist world-system, and its inherent inequality between and within states, rested in part of the universalisation of this idea of national development being achievable by all states. It is in this sense that Wallerstein sets the Russian Revolution as the consolidation of the capitalist world-system, through its elaboration and promotion of an alternative model or strategy for the same, shared goal of development (see Wallerstein 1979).

Secondly, specific ideas about school education, evident in the structures, formal policies and practices in Cuba, were similarly shared across the world-system as part of a world-systems geoculture of development. That is, understandings about the roles and functions of the school in society, linked to the development project and processes of state formation and legitimation, linked also to the modern state as it developed within the capitalist world-system. If socialising loyal citizens of the state was a feature of world culture with respect to the institution of school education, and the notion of a sovereign state in the interstate system pursuing national development central to the functioning of the world-system, the compatibility of the citizenship function to the world-system can be reasonably inferred.

Thus a number of points were identified that could support such a world-systems geocultural, perspective. These included: the priority placed on development by the revolutionary government, and its centrality to the socialist project; a commitment to universal access to school education and increasingly levels of compulsory education; school education to form loyal state members or citizens; and school education to initiate students' vocational orientation and training, as preparation for their later participation in the workforce. With this level of shared objectives, models and practices of secondary schools within the development project, the structure of basic secondary education, followed by academic or vocational specialisation determined by formal assessment, was consistent with the world-systems perspective. Given the potential in revolutionary Cuba for a radically different model and approach to secondary school education to emerge, the early signs of convergence with global systems endorse the need to look beyond the national context to explain this.

By the time that the great debate ended in Cuba, preliminary support for the world-systems geocultural approach to secondary school education in Cuba was established. This was seen in statements from various Ministries and the highest national leaders; the partial specialisation of secondary education; the emphasis on vocational orientation and training; and the articulation of socialist political objectives in these terms. That is, evidence that the secondary school educational response in revolutionary and socialist Cuba was influenced by the country's underdevelopment within the capitalist world-system, and the system's geoculture with respect to the perceived functions and intended political, social and economic outcomes of the schooling process.

More dramatic change in secondary school education, however, was to emerge in later years, with events in the politically radical period of the late 1960s in Cuba further supporting a potentially radical shift in schools. This period then, constitutes a good context in which to further test and develop the world-systems approach being advanced.

Chapter II:
Economic crisis, the Soviet shift and the schools to the countryside, 1966-1970

> The children's lives will be perfectly organized ... there will be no opportunity to go astray or acquire bad habits ... they will progressively acquire the best habits that society can give a human being, its best sentiments, its best concepts. To that school they will go to be prepared to face life...
>
> - Fidel Castro, 1967, cited in MINED (1967c)

INTRODUCTION:

In 1966, following debate on alternative models and strategies to build socialism and communism, a model of economic planning and organisation, directed by Fidel, was implemented (see Zimbalist and Eckstein 1987; Zimbalist 1985; Fitzgerald 1990; Edelstein 1985; Brundenius and Zimbalist 1990). The official emphasis on sugar production, as the key to future national economic development, was well entrenched as the long campaign to harvest ten million tons of sugar in 1970 continued. Stages of the campaign were pursued through a combination of detailed planning, and the mobilisation of volunteer labour at strategic points. In this way Che Guevara's influence on the model for the national economy, directed by Fidel, was apparent. Moral and political exhortations were used to mobilise workers and raise production, based in the new, revolutionary political consciousness of the population.

This subjective political influence in economic strategies carried over into radical political positions, and views on international relations involving socialist states, being very publicly expressed by the Revolution's leadership. The policies of Communist Parties in Latin America, particularly those involving peaceful or parliamentary strategies, were criticised, extending to a radical critique of the Soviet Union (see Primer Congreso de Solidaridad de los Pueblos de América Latina 1968; Domínguez 1989). Domestic conditions, and political and trade relations with members of the international socialist community, were necessarily linked to the expressions and

policies advanced. A radical political context was thus extended, with implications for secondary school education.

This context saw the radical "Revolutionary Offensive" (*Ofensivo Revolucionario*) officially launched in 1968, extending nationalisations to small businesses and industries, and other domestic policies as part of a "push for communism" (Eckstein 1994, pp. 33-41). The politicised reforms of the 'Offensive' were connected to domestic economic problems, and thus acted to justify policies of economic austerity and individual sacrifice, until sustained socialist and communist development was achieved. The radical rhetoric and reform set a context for the first of the schools in the countryside (ESBEC - *Escuela Secundaria Básico en el Campo*), constituting the most radical departure from conventional models of school education. The new schools were officially presented in highly politicised terms, but like other reforms they also pragmatically responded to and reinforced the underlying development goals of the socialist project. They did this by providing a source of organised labour for agriculture, and hence potentially contributing to domestic production, exports, and the wider plans for national social and economic development. .

The context of radical Cuban politics saw formal relations between the Cuban leadership and their Soviet counterparts (and by implication the Soviet Bloc) seriously threatened. The political crisis coincided with ongoing production problems, and the prospect of more serious problems in the event of a negative economic response by the Soviet Union. Difficult domestic conditions combined with the death of Che Guevara in Bolivia, and the failure of other revolutionary movements in the region sympathetic to the radical Cuban politics, to bring rapprochement with the USSR. This began with Cuban support for the Soviet invasion of Czechoslovakia in 1968, and increased economic, social and political links until the crisis of the failed ten million ton *zafra* in 1970. The full and formal integration of the Cuban economy into the Council of Mutual Economic Assistance (CMEA) followed, as the basis was laid for a review of the Cuban strategies for rapid communist construction. This was to be replaced by the uncritical adoption of Soviet models and methods, and expression of their political line, under the banner of rejecting Cuban idealism of the 1960s and learning from the Soviet experience.

The decisive shift to political and economic alignment with the Soviet Union begun symbolically with support for Czechoslovakia.[46] It was consolidated by the depth of the crisis in 1970, when domestic discontent and economic disarray made the immediate benefits of alignment irresistible. For secondary school education, major improvements were foreshadowed as the Soviet influence increased. The early indications, however, were that even with the shift from radical independence to Soviet alignment, continuity ensued with respect to the objectives and major structures of secondary schooling.

The articulation and presentation of school education policy connected with the domestic political and economic context. Thus the period of radical politics and accompanying economic mobilisations produced policy highlighting the school's role in the formation of the new socialist citizen promoted by Che Guevara. This goal of communist formation was central to the government's justification of the first 'schools to the countryside' trialed in the 1965-66 school year (see García Gallo 1967), and later 'schools in the countryside'.[47] Participation in productive work was cast as an essential part of students' communist formation, overcoming the separation of theory from practice that had been identified as a feature of the old bourgeois or capitalist education. The implementation of the strategy indicated the centrality of the formal objective of students socialist or communist political formation in secondary school.

Alongside the radical politics of this period, challenging the economic orthodoxies of both the capitalist and 'real existing socialist' states, domestic economic conditions and

[46] This was a significant concession to the Soviet Union in 1968, given Cuba's public and radical critique of post-war industrialised capitalism, the impact of global capitalism on the 'Third World,' and especially the associated critique of the *Old Left* or orthodox Soviet model of socialism, making Cuba a potential, major force in the emerging *New Left* (see for example Wallerstein 1991a; Arrighi, Hopkins, and Wallerstein 1992; Cranston 1971).

[47] This emphasis was perhaps best expressed in the appearance of a periodic broadsheet from the Ministry of Education entitled: *Educación – Hacia el Hombre Nuevo* (Education – Towards the New Man), which described the values and attitudes the new socialist citizen would possess, and promoted the principle of *estudio-trabajo* (work-study) as a central strategy for this political formation. This is discussed in more detail in the section on *Work-Study and the new socialist citizen* below, p. 108.

problems also impacted on policy.[48] Thus alongside the priority of students political formation in school, in the new ESBECs for example, economic considerations were also present. The need to mobilise labour for key production campaigns and targets, and find a means of financing the expansion of secondary school education, were also behind the new model of schooling. Similarly, the emphasis on work was linked to parallel educational objectives to support the national economy, through the transmission of basic work skills, as part of the broader revolutionary program of rapid economic development. National political and economic objectives thus continued to shape secondary school policy, and the structures and practice of its expansion, over the 1966-1970 period.

Evidence of the Cuban Revolution, as a socialist development project, continuing to impact on the development of secondary school education emerges in the analysis. From this, and an impending and more direct influence via the Soviet shift, arguments for the conditioning influence of the capitalist world-system over secondary school education are made. The critical point emerging from the analysis is that across the more radical and / or independent political positions of the revolutionary government, and the turn towards Soviet alignment, the same basic trends and underlying objectives in secondary school education are found. This adds considerably to the argument for a world-system level influence.

Structuring the argument

The structure used in this and subsequent chapters, begins by reviewing the national context. This establishes a picture of the national political economy, situates it in within the broader capitalist world-system, and identifies some of the ways in which the world-system influenced the national conditions. The basis for this level of world-system influence over school education specifically is thus established.

[48] The argument made Zimbalist and Eckstein (1987) or Zimbalist (1985), for example, is that domestic economic conditions made the use of financial incentives to work effectively impossible, hence the push for moral incentives, voluntary work, mobilisations and the new socialist citizen was presented in political-ideological terms. Even Edelstein's (1985) less critical account acknowledges that pragmatic factors were present alongside the political and ideological objectives.

The first two main sections then, review the economic strategies pursued and problems encountered by the government, highlighting the continuity of the 'Third-World' type model of commodity export led development within the world-system. An account of Cuba's independent and radical politics within the socialist community follows, moving into the 'Revolutionary Offensive,' but highlighting the domestic economic reasons behind the drive for communism. Finally, domestic economic problems, culminating in the failed ten million ton *zafra*, are identified as key factors behind the shift towards alignment with the Soviet Union that marked the close of the decade.

Having characterised the national context and identified some of the ways this was influenced by the world-system, sections dealing with the conditioned national political and economic influence on secondary school education follow. Formal policy, structures and procedures established for secondary schooling, based in national political and then economic objectives, are identified in the primary documents. Links are made between secondary school education and the national political economy, and through this relationship a level of world-system influence asserted. Continuity in policy seeking to use secondary schooling for politicised national citizenship and national economic development objectives is emphasised, along with the trend of the more explicitly political goals of communist formation being articulated and expressed in terms of the development objectives.

Finally, drawing on the characterisation of the national conditions and description of major related trends in secondary school education, the argument for a world-systems geocultural perspective to explain the trends and developments is made. Evidence of a world-systems influence over secondary school education is cited and discussed, in terms of the world-economy's impact on the national setting in turn impacting on school education; and the world-systems geoculture of development shaping broad policy assumptions, objectives, and intended outcomes. In conclusion, the consistency of these objectives and policies across the changing domestic climate, and the case for a world-systems approach to explain this, is made.

THE NATIONAL CONTEXT, 1967-1968

Putting politics and production first

The model of social and economic planning that emerged from the process of formal debate, following Fidel's intervention, drew heavily from the strategy promoted by Che Guevara.[49] Che Guevara himself, however, had disappeared from public view in mid-1965, going first to support the independence and anti-imperialist guerrilla struggle in the Congo (later Zaire), and then to Bolivia in 1966 to establish and lead a guerilla movement (see Anderson 1997; Franklin 1992; Betancourt 1971).[50] In his absence the new strategy was firmly associated with, and under the direction of Fidel, being described as the "Fidelista" model (Fitzgerald 1990, p. 45), "Sino-Guevarism plus Castroism" (Mesa-Lago 1978, p. 8), or simply "Fidelismo" (Gonzalez 1974, p. 197). In this context the charismatic leadership of Fidel overshadowed, and began to replace, more formal or systematic planning processes.

The *Fidelista* model was consciously linked to the ten million ton sugar campaign, and involved the extensive use of voluntary labour via political mobilisations. Formal planning gave way to what Brundenius and Zimbalist (1990) described as "Castro-inspired miniplans" (p. 123) in 1966, while the powers of the Central Planning Board (JUCEPLAN) were simultaneously weakened (see also Zimbalist 1985; Brundenius 1984). Decision making power over macro and micro level economic decisions was increasingly concentrated "in Fidel personally and his inner circle" (Gonzalez 1974, p. 199). As this process continued into 1967, the government stopped preparing national

[49] Fitzgerald (1990) presents the ensuing model, driven by Fidel, as combining elements of the two major positions (p. 45), but other analyses tend to characterise it as an extension of Che's proposals, particularly given the emphasis on material incentives and political consciousness (see Brundenius and Zimbalist 1990; Mesa-Lago 1978; Gonzalez 1974; Brundenius 1984).

[50] From the Second Declaration of Havana in 1962 until the Che's defeat and death in Bolivia in 1967, the Cuban leadership actively supported a number of regional revolutionary movements, in line with its radical politics and the expressed need to end the Revolution's isolation on the continent. The suggestion of a split between Castro and Guevara being behind Che's departure, is dismissed in Anderson's (1997) recent and comprehensive biography of Che Guevara. He affirms support and perhaps some encouragment from Fidel for Che to leave for Africa where there were "real revolutionary possibilities" (p. 628), but concludes that it was a joint decision in line with Guevara's desires to personally promote and lead Revolution on the continent (pp. 626-28).

budgets, rejected the practice of conventional accounting that measured income, costs and profits within and between state enterprises, and de-linked wages from work norms as part of the radical political period (see Rodríguez García 1990, pp. 113-19).

Edelstein (1985) and Fitzgerald (1990) present Fidel's intervention to end formal debate in terms of a decision to put production first, rather than continue to debate which structures and organisational practices were best to achieve development on the way to communism. Such an interpretation is supported by the setting of national economic goals, coupled with a strong commitment to "rapid development" (Gonzalez 1974, p. 197) and the underlying strategy of direct intervention by Fidel, establishing special plans to address production problems. The emphasis on production and development, however, and strategies to achieve them, remained highly politicised. The *Fidelista* path, coupled with the radical politics being expressed, was presented as the road to rapid and independent communism on the island, with these political-ideological goals motivating production efforts. The official emphasis on politically motivated and mobilised labour, to make a rapid break into communism, demonstrates the politicised nature of the development project and strategies put into place.

Given this characterisation of the domestic economic strategy and context, its relationship to the capitalist world-system needs to be kept in mind. As noted in chapter I, in response to shortages and problems experienced in the early attempt to rapidly diversify and industrialise the national economy, the leadership returned to a more gradual and conventional model for national economic development. That is, a model of exporting agricultural commodities in world markets to gain the hard currency that could finance capital investment and the import of modern technology and capital goods. These in turn could lead to a gradual process of domestic industrialisation, diversification and import substitution, establishing the basis for further development. Such a development policy was similar to that of other peripheral states in the world-system (see for example World Bank 1975; Wallerstein 1979, ch. IV and V; 1995a, ch. III). By the mid-1960s, this development strategy had been entrenched in Cuba (see for example Figueras 1965; Edelstein 1985; Mesa-Lago 1971b, 1978).

Although the leadership loudly emphasised the radical political basis of the Cuban project, the development path dependent on primary commodity exports remained

subject to the uncertainties of world market commodity prices, and the inherent exploitation through the processes of unequal exchange (see Wallerstein 1983a; Chase-Dunn 1990, ch. XI). This is implicit in the Cuban strategy, seeking to finance the creation of alternative, value added production both for export and to substitute for imports. Chase-Dunn (1982b) argues that whilst the organisation of the commodity production may have been along egalitarian lines, with the income directed rationally towards social development, it continued to be a part of, and functional to, the capitalist world-economy (pp. 28-32). Cuba's later integration into the CMEA would bring longer-term and more favourable agreements on trade and prices, with the USSR and other member states, that reduced the impact of the world economy on the prices and benefits received in the sale of its agricultural commodities (see Eckstein 1982). The critical point developed in this chapter, however, is that the government actively continued to pursue the world-system concept of national economic development within the existing world-system. This was done through radically applied domestic strategies for increased production, efficiency, exports, and more favourable terms of trade, to bring upward mobility within the world-system.

This issue of the Cuban state's location within the world-economy, and the unfavourable and exploitative trade relations with the developed core states helping to maintain Cuba's underdevelopment, was at the heart of Cuba's radical politics in the mid-1960s. This is apparent in Che Guevara's 1965 criticism of Soviet policy on trade with newly liberated, developing countries like Cuba. Speaking to the Economic Seminar of Afro-Asian Solidarity in Algeria, Guevara charged that the idea of "mutually beneficial trade" between underdeveloped countries and the Soviet Union was "immoral," since it was by definition "based upon an unequal law of value and of international relations which are a product of that law" (cited in James 1970, p. 132). Guevara argued that "the development of the countries who are now starting on the road to liberation should be paid for by the socialist countries" (cited in Domínguez 1989, p. 66). He went on to publicly accuse the USSR and its allies of effectively acting as "accomplices of imperialist exploitation" by demanding any return on assistance for underdeveloped countries, adding that they had a "moral duty" to end this "tacit complicity with the exploiting countries of the West" (cited in Domínguez 1989, p. 67).

This critique clearly acknowledged the difficulties of achieving development within the capitalist world, without an authentic, qualitative shift in trade relations.

The radical critique of development theory under capitalism, and the role of international trade and relations in maintaining underdevelopment, were apparent in statements like this from Che, and speeches by Fidel on the question of development (see Castro 1991). This was also apparent in the early attempt, prior to the "return to sugar" (Mesa-Lago 1971a. p. 297), to break once and for all the island's mono-cultural economic dependence that reinforced its underdevelopment. This climate accounts for early plans for accelerated industrialisation and massive rates of economic growth, supported by the nationalisation of industry and state planning targeting import substitution and new exports. The major problems encountered in pursuing these plans, especially the domestic upheaval, shortages, and difficulties establishing new industries and markets given United States hostility towards Cuba, were major factors behind the return to sugar. Guevara, a major proponent of the early strategy for accelerated economic independence, accepted the more conventional model reliant of commodity exports, but he remained critical of the inherent exploitation in such arrangements (in Gerassi 1968, pp. 349-59).[51]

Thus within the capitalist world-economy, Cuba returned to a development strategy targeting agricultural sectors for ongoing unequal trade within the world market, to gradually finance the transformation of the national economy and trade relations. Upward mobility within the hierarchy of the world-system was the goal. The conventional strategy could only bring results by simultaneously keeping revolutionary and socialist Cuban politics at the forefront. Thus by the mid- to late-1960s, the country was engaged in mass mobilisations of labour, voluntary work, and 'Castro-inspired mini-plans,' directed toward the ten million ton *Zafra*. Production was politicised, whilst socialist politics advocated economic development and independence. However

[51] Domínguez (1978) notes some resistance from Che Guevara towards the reliance on sugar and agriculture, and his ongoing belief that development depended on industry rather than agriculture after conceeding to the new policym (p. 385).

much these efforts were presented as, and contributed to, raising participants political consciousness, the ongoing impact of the capitalist world-economy over the island's status and policy options was also apparent. Production and productivity to finance development, motivated by socialist politics and influenced by the world-system, thus characterised the period.

Independent, radical politics

The radical politics of Cuba in the 1960s were apparent in all areas of policy. National economic strategies, initiatives, and projects of all kinds were presented in terms of a conscious effort to construct communism on the island (see for example Edelstein 1985; Gonzalez 1974; Eckstein 1994). As noted above, the economic and socialist-political objectives being pursued continued to be presented as overlapping, such that economic projects like the ten million ton *zafra* became identified by the leadership as essential components of the objective of building communism. This synthesis was well captured by Fidel's assertion that "The correct path is not to create [political] consciousness from wealth, but to create wealth from [political] consciousness" (Castro 1968c, p. 55).[52] In the same speech Fidel spoke of the need to continue reducing wage differentials, so that in the foreseeable future "everyone will have to receive the same" (Castro 1968c, p. 55). Statements like these emphasise the radical political aspect of the socialist development project.

The *Fidelista* approach thus extended the radical politics of Che Guevara to some extent, continuing to talk of the new socialist citizen, liberated from capitalist exploitation, working as part of the social collective to achieve material growth, along a distinctively Cuban path towards communism (see for example Castro, 1966a). On the other hand, Che Guevara's expressed fear of institutionalising the Revolution and separating the leadership from the masses (Guevara 1964b), appeared to contrast with

[52] In the original Spanish, *conciencia* (consciousness) is used to refer to a mixture of political and moral consciousness. The translation "[political] consciousness **from**…" and "wealth **from**…" is used for the Spanish *con* which translates literally as "with," but in this case the emphasis is clearly on the creation of one thing (wealth or consciousness) as a result of the other. The original quote is: "*El camino no es crear conciencia con riqueza, sino crear riqueza con conciencia."*

the practice of top-down directives and decision making structures, with an associated de-emphasis on the role of trade unions in this period (see Pérez-Stable 1993a; Pérez-Stable 1993b; Fitzgerald 1990; Hernández and Mesa-Lago 1971). The real shift away from the more radical political positions, however, came with the process of alignment with the Soviet Union over 1968-1970 and beyond, breaking with the idealism of Che.[53]

In the post-debate period then, radical politics maintained a high profile in terms of public rhetoric, and the politicised attempts to rapidly construct communism and achieve development through extraordinary work efforts in traditional industries. Radical politics were similarly apparent in the foreign policy and diplomacy of the revolutionary government. At the 'First Congress of Solidarity with the People of Latin America' held in Havana in 1967, Fidel championed the ideological credentials of Cuba and its revolutionary leadership, and vigorously denounced any claims of an alternative, non-revolutionary or peaceful road to socialism (see Castro 1967; Primer Congreso de Solidaridad de los Pueblos de América Latina 1968). The official Cuban position was made clear, in conflict with the Soviet Union's more moderate line, affirming that "the role of the guerilla in Latin America," and hence armed struggle and revolution, was the only legitimate strategy for achieving socialism (Castro 1967, p. 136).

Fidel's implicit criticism of the policies of the Soviet Union, without directly naming them, complemented Che Guevara's direct attacks. Anderson (1997) highlights this to assert that they were in fact working together to express the official Cuban position (p. 627). A level of independence within the socialist community is evident in Cuba's involvement in the CMEA being limited to observer status until July 1972, when it became a full member (see Asonov 1973, p. 155). Fidel had been strongly criticising the Soviet Union for supporting and trading with Cuba's enemies in Latin America, and not doing enough against U.S. imperialist actions in the Dominican Republic and Vietnam (see Castro 1965a; 1967; Gonzalez 1971). In 1967 Fidel declared, in clear reference to the Soviet Union, that:

[53] For a contemporary Cuban analysis of this question, see Martínez Heredia (1995a).

> This Revolution will never be anybody's satellite or 'yes man'. It will never ask anybody's permission to maintain its own positions either in matters of ideology or on domestic or foreign affairs (cited in Domínguez 1989, pp. 70-71).[54]

Tensions between Cuba and the Soviet union increased with Cuba's trial in 1968 of members of a pro-Soviet 'micro-faction' within the Cuban Communist Party, leading to Party expulsions, arrests, and claims of direct interference by Soviet advisers (Domínguez 1989, pp. 73-4). The radical politics of Cuba continued to be expressed.

Some interpretations, like that of Gonzalez (1971; 1974), suggest that this independent stance towards the USSR was primarily a tactic to extract greater concessions from the socialist superpower, and that the radical domestic policies and politics were pragmatic responses to the particular historical conditions of Cuba's economy and society. While these were no doubt factors in the decision and policies made by the Cuban leadership at this time, the key point for this research is that a radical political posture was consistently expressed in this period. In this context, despite the intervention of Fidel to end the official debate, and the longer-term, gradual tendency of limiting "pluralism of expression" within the Revolution (see Habel 1991, p. 104), a sense of creating an independent, revolutionary path to socialism and communism remained.

This is well illustrated in the decision of the Political Bureau of the Central Committee of the PCC to temporarily cease publication of the Party's theoretical Journal, *Cuba Socialista*. A note from the editorial board in the February 1967 issue noted that the journal had been originally intended to examine multiple aspects of the class struggle towards socialism, using scientific Marxist theory, but that the journal had tried to deal with too many theoretical problems, while lacking adequate theoretical elaboration from the Party and its leadership (Buró Político 1967, pp. 2-3). Publication

[54] This followed Fidel's earlier assertion: "We want to construct Communism. Since there is no manual, index or guide, and since no-one has yet completed this task, we have the right to attempt it using our own measures, procedures and methods" (Castro 1966a, p. 66).

was thus suspended, at least until the first congress of the PCC then set for 1970, at which it was envisaged that the Party would formally adopt "decisions about some of those theoretical, strategic and tactical problems of the revolutionary movement in the world, and about various problems of building socialism and communism" (Buró Político 1967, p. 3).[55]

In the same month that *Cuba Socialista* postponed publication, another journal was launched to continue the promotion of an independent, revolutionary and socialist debate. The new journal, *Pensamiento Crítico* (Critical Thinking), came from a group of academics in the University of Havana's faculty of philosophy, and was intended "to respond to Revolutionary Cuba's actual need for information about current developments in political and social thought" (Consejo Editorial 1967, p. 1). The editors went on to note:

> we will endeavour to inform about current problems and existing opinions about these, through unedited articles from Cubans and foreigners, and the reproduction of selected articles from the most diverse publications in the world. (Consejo Editorial 1967, p. 1).[56]

The atmosphere of discussion and debate within the anti-capitalist, national project and international context, is described by Santana-Castillo (1995):

> It was characterised by debate, diversity of opinions and creative freedom. Works by authors prohibited in other socialist countries, like George Lukacs, Karl Korsch, Louis Althusser, Antonio Gramsci, Jean Paul Sartre, Andre Gunder Frank, etc., were published in books or journals like *Pensamiento Crítico* (p. 29).

[55] While the first congress of the PCC was planned for 1970, it did not take place until 1976, by which time the alignment with the Soviet Union was such that Cuba's official political position was clearly defined (see Alonso-Tejada 1995; Santana-Castillo 1995; Martínez Heredia 1995a).

[56] Fernando MartPnez-Heredia, a founding member of the editorial board of *Pensamiento Crítico*, observes that through the journal, the group in the Philosophy Department played a significant role in the development of Marxism at the time, but that the project was "first sanitised," and "consciously buried later" (MartPnez-Heredia, 1995, p. 21).

The content of some of the early articles published in *Pensamiento Crítico* confirms the continued climate of debate within the Revolution, prior to the post-1970 Soviet influenced political and economic institutionalisation of the Cuban revolution, and the period described by the high profile Cuban writer Ambrosio Fornet as the "Gray Quinquenium (Kosichev) of 1971-75" (in Diana and Beverley 1995, p. 419).[57]

Statements and articles critical of both the Chinese and Soviet models of socialism, combined with the anti-capitalist transformations of the domestic economy and society, maintained the climate of radical revolutionary politics towards both the capitalist world and real existing socialist states. The radical politics, however, remained within the capitalist world-system, and the national revolutionary project continued to be, primarily, one of rapid catch-up development. Radical politics and domestic economic problems associated with the development project, linked to trade and the crisis in diplomatic relations with the Soviet Union, provided the background for the 'Revolutionary Offensive' and then shift towards political and economic alignment with the USSR.

DOMESTIC AND EXTERNAL CRISIS, 1968-1970

The Revolutionary Offensive: Ideology and economy

Cuba's radical political climate had produced the expressed commitment to defy in particular the Soviet orthodoxy and quickly achieve communism on the island, assisted by the rapid transformation of the population's political consciousness. The *Ofensivo Revolucionario* (Revolutionary Offensive) launched in 1968 emerged as an active

[57] Examples of this critical attitude include an article by the Polish writer Kewek Karol (1968) on China's Cultural Revolution, in which he affimred that the Cultural Revolution was an implicit recognition by Mao of the general failure of communist parties, once they had achieved state power, to practice true working class democracy; and that in countries like the USSR promises of such democracy "formed part of a liturgy that nobody takes seriously" (p. 148). An article by Sartre (1968) published in the in a later issue observed that the USSR risked becoming a "curious world of non-capitalist petty-bourgeois, state capitalism" (p. 191). True to its charter, the journal sought to provoke debate over alternative models of socialism, an article as late as 1970 noting that "there are many Marxisms" (Gómez-Barranco 1970, p. 49).

expression of the revolutionary politics. The Offensive nationalised the remaining small (non-agricultural) private businesses, numbering slightly more than fifty thousand, to promote the new culture and political consciousness of the new society (Rodríguez García 1990, p. 244; Domínguez 1989, p. 72). Fidel explained the initiative by citing extensive studies done by the Party into the into the incomes and exploitative, anti-socialist attitudes and behaviour of the small business sector (Castro 1968e, pp. 29-36). He added that small businesses had in fact grown since the triumph of the Revolution, and hence were "not an evil which would progressively disappear as we would have perhaps wished" (Castro 1968d, p. 3). Further affirming the ideological basis of the offensive, Fidel asserted that "Whatever it may be, large, intermediate, or small, exploitation must disappear" (Castro 1968d, p. 2).

At the level of official policy then, the Revolutionary Offensive was the firm and logical extension of Cuba's independent construction of socialism and communism on the island. Acknowledging criticism of Cuba's goal of building socialism and communism simultaneously, Fidel declared that the communism in which he believed was the communism of Karl Marx, and hence that the suppression of remaining private business was a necessary step in the struggle to achieve this (Castro 1968e, p. 34). In March he asserted that only the authentically Marxist model of communism being pursued by Cuba was valid, since, "any other type of communism ... is not worthwhile – what sense would it have?" (p. 36). Speaking at the July 26 celebrations of the same year Fidel argued that Cuban project was in line Marxist-Leninist principles, with the material basis of both socialism and communism being developed in conjunction with the lifting of people's political consciousness (see Castro 1968g).

The Revolutionary Offensive was also motivated by concerns for the domestic economic performance. On both of the occasions cited above, Fidel's explanation of the political rationale of the measure was preceded by details of economic problems, shortages, the rationing of new foodstuffs like milk, and above all "the need for this generation to dedicate itself entirely to work" in order to overcome these problems (Castro 1968d, p. 2; see also Castro 1968e). In April he foreshadowed the communist society of material abundance towards which they were striving, and the egalitarian and just distribution of wealth on which this society would be based, but stressed that such

talk was futile unless real efforts were made to produce the required wealth (Castro 1968f). It is here that the underlying economic development imperative of the radical Cuban project, and specifically the Revolutionary Offensive, can be seen:

> no matter how just the distribution, wealth must first exist. Wealth is not created by justice, it is created by work. Justice can merely distribute the wealth in a more humane way, in a just manner. Justice can distribute what work creates, but justice cannot replace work in the creation of wealth (Castro 1968f, p. 9).

On top of physical production problems being encountered by the government, Rodríguez García (1990) notes that measures like the 1968 introduction full wages for all workers unable to work due to sickness, accidents or pregnancy; or full wages for retirees who had demonstrated a high revolutionary consciousness, added to the domestic economic problems at this time (p. 244). Worker absenteeism and indiscipline compounded the problems, bringing lower production and productivity (see Rodríguez García 1990, pp. 116-17).

An emerging crisis was apparent in Cuba, pressuring the leadership to find solutions to the ongoing production and distribution problems that were creating public discontent and potential political problems (see Castro 1968d, 1968e; Gonzalez 1974). The impending crisis was made more acute by: a growing black market as people turned to private businesses and profiteers to secure scarce goods (see Pérez-Stable 1993a; Eckstein 1994); worsening relations with the Soviet led socialist bloc (see below); and the emergence of a pro-Soviet faction within the Communist Party questioning the current leadership's policies and apparently challenging for power (see Domínguez 1989; Gonzalez 1974). According to the long-term plan for the ten million ton *zafra*, sugar production was to be eight million tons in 1968, but fell well short at just 5.3 million tons (see Rodríguez García 1990, p. 122). The indications were that major, and if necessary radical, measures had to be taken in order to lift national production, productivity and growth, and maintain the legitimacy of the government and its program of socialist Revolution.

Brundenius (1984) argues that there had been some optimism amongst the leadership in 1967 of an economic recovery, but that by 1968 there were "still signs of commodity shortages, and the black market was flourishing" (Brundenius 1984, p. 55). Thus by 1968 the domestic economic performance continued to create problems for the government, heightening the need to dramatically lift production and mobilise workers for better productivity. Increased state control over all aspects of the national economy was perceived as a step towards achieving this. Eckstein (1994) develops this line further, arguing that with the emphasis on capital investment and maximising hard currency exports, the state needed to free the labour working in the private sector for agricultural work, and particularly for the sugar industry as the crucial 1970 harvest approached (pp. 35-38).

With a tight program of national capital investment for future diversification and growth, and an underlying priority to hard currency earning exports in the short and medium term to finance this, a measure which "collectivized almost the entire economy" (Brundenius 1984, p. 55) could potentially do much more than support any ideological battle with the West or within the socialist camp. In pragmatic, economic terms, the policy had the effect of "thrusting tens of thousands of workers into the state sector" (Zimbalist 1985, p. 216), with some twenty five percent of those whose businesses were nationalised in 1968 moving into the agricultural sectors (Eckstein 1994, p. 37). Hence like the second land reform of 1963, the Revolutionary Offensive was in part a strategic response to the full political and economic situation on the island, and not exclusively a political-ideological initiative.[58]

Czechoslovakia and the Soviet turn

The review of the national context shows clearly that radical politics and assertions of independence within the socialist states were linked to the authentic and popular nature of the Cuban Revolution, and an attempt to maintain its sovereignty having

[58] The second agrarian reform in October 1963 further reduced the maximum private land-holdings from 402 to 67 hectares, giving the state direct control over an additional 19 percent of all land. For details see (Brundenius 1984; Rodríguez García 1990).

adopted a communist path. They also provided, at least in part, political-ideological justification for policies and actions designed to directly support the project of socialist economic development.[59] Indeed, there seems to be general agreement that few alternatives were available other than the adoption of strategy and rhetoric of moral over material incentives in the mid 1960s. An alternative strategy to increase production with material incentives and rewards was not feasible, in the context of a high investment ratio and a serious shortage of consumer goods and hard currency for imports. Given these conditions, the approach of raising the political consciousness of the citizenry first, as the basis of later increased production, wealth creation and consumption, was strengthened (see Zimbalist 1985; Zimbalist and Eckstein 1987; Brundenius 1984; Brundenius and Zimbalist 1990; Eckstein 1994; Edelstein 1985).

Extensive economic, cultural and political links with the Soviet Union, and other members of the CMEA, also underlay the radical politics (see Rodríguez García 1990; Kolésnikov 1983; Baklanoff 1971). With respect to foreign trade, Baklanoff (1971) notes that between 1961 and 1968 the Soviet Union accounted for, on average, 44 percent of Cuban exports and 52 percent of imports (p. 259). These extensive and ongoing trade relations support the argument that the radical politics were, to some extent, part of an attempt by the Cuban leadership to extract greater economic concessions from the Soviet Union (see Baloyra and Lozano 1993; Domínguez 1989; Gonzalez 1974). Cuba had experienced an authentic and popular revolution, that had subsequently taken a socialist turn, and hence the potential value of Cuba to the Soviet Union was high, as the first member of the socialist camp in the Americas.

Taking into account the domestic political posturing and manoeuvring for advantage in bilateral relations, a critical point in Cuban-Soviet relations was clearly reached in 1968. Eckstein (1994), for example, notes that in the preceding period Cuba had vigorously sought to "export revolution" externally, on top of an apparent "push for

[59] These ranged from economic austerity measures like restricting wages and consumption by replacing these with 'moral incentives'; to the mobilisations associated with the 10 million ton *zafra* or the nationalisations of the Revolutionary Offensive.

communism" domestically, at the very time that the Soviet Union was advocating "peaceful coexistence" (p. 39).[60] This policy was promoted forcefully in the time of Che Guevara who personally took part in campaigns in the Congo and Bolivia (see Anderson 1997; Betancourt 1971). His death in Bolivia marked, symbolically, a shift in Cuba's revolutionary internationalism, the lack of success of the policy also playing a part in the policy shift and turn towards alignment with the Soviet Union.

Relations with the Soviet Union had been uneven over the course of the Revolution. Major early problems had included Cuban dissatisfaction over Khrushchev's handling of the missile crisis, closely followed by disagreement over the nuclear test ban treaty of 1963 and then Castro's attacks on the pro-Soviet PSP the following year (see above and Domínguez 1989). Speaking at the event marking the formation of the Communist Party of Cuba in October 1965, Fidel added, in clear reference to the Soviet Union, that "we will never ask any-one's permission to do something … to go somewhere … to befriend a party or a people" (Castro 1965b, p. 57). Formal relations subsequently improved, with Fidel clearly ruling out alignment with China in the Sino-Soviet split in January of 1966, in a public attack on the Chinese government (see Castro 1966b; Matthews 1975, pp. 239-40; Domínguez 1989, p. 69).[61] This concession to the Soviet Union did not mark a definitive shift, however, as the hieghtened rhetoric on Revolutionary movements in Latin America in 1967 shows. By this time Cuba was supporting Venezuelan guerillas in their armed struggle against both their government and the Soviet supported Venezuelan Communist Party, whilst the Central Committee of the PCC issued a statement affirming: "we are helping and will help, whenever we are asked to do so, all the revolutionary movements that fight imperialism anywhere in the world" (in Gonzalez 1974, p. 138).

[60] Cuban support for revolutionary guerilla movements in the region included, in the mid 1960s, those in Peru, Venezuela, Colombia and Guatemala. For full details of the numerous movements supported by Cuba, and the forms of this support, see Anderson (1997) who notes that from January 1962, promoting continental revolution had become formal "government policy" (p. 533).

[61] By this time Che Guevara, identified as being most critical of the Soviet Union and sympathetic to the Chinese model, had disappeared from public view (see Betancourt 1971; James 1970; Mesa-Lago 1978).

The critical point came with the public trial of former PSP members in the 'micro-faction' affair in 1968, accused of espionage in collaboration with Soviet and East European officials on the island (see Domínguez 1989; Baloyra and Lozano 1993). In disapproval the Soviet Union slowed the delivery of oil supplies to the island, while Cuba responded by publicly boycotting the international meeting of Soviet aligned communist parties held in Budapest. Despite these signs of ongoing radical political posturing by Fidel[62], conditions pushed Cuba towards rapprochement with the Soviets. These conditions included: Che's death and the lack of success of regional revolutionary movements; existing U.S. economic sanctions and reduced regional political and economic ties due to U.S. pressure; economic repercussion from China following the events of 1966[63]; the threat of serious economic actions by the Soviets; and existing domestic economic problems. In this context of ongoing domestic shortages of consumer goods, and the critical importance of the Soviet Union and its allies in the island's strategy of development financed by sugar exports, pressures to resolve this situation were strong.

This was the context in which Fidel made his famous television address in August 1968, giving qualified support to the Soviet Union's invasion of Czechoslovakia (see Castro 1968b). The difficulty reconciling this with Cuba's expressed independent position in foreign affairs was apparent as Fidel acknowledged that the government's decision would appear "in contradiction to the emotions of many ... [and] ... in contradiction to our own interests" (Castro 1968b, p. 38). Going further, Castro (1968b) recognised that the pre-Dubcek leadership of Czechoslovakia had been characterised by "many defects, dogmatism, bureaucracy, and ultimately many things that could not be called a part of a truly revolutionary model of leadership" (p. 42). He added that through its intervention the Soviet Union had "violated the sovereignty of the Czechoslovakian

[62] In a speech in March 1968 Fidel referred to public uncertainty regarding the Central Committee's decision not to send a delegation to the meeting, linking the decision in his talk to Cuba's independent Marxism and the Revolutionary Offensive (Castro 1968e).

[63] For example, as a percentage of total exports, Cuban exports to China had dropped significantly from a high of 14.7 percent in 1966 to 9.3 percent in 1968 (Baklanoff 1971, p. 260).

state" (p. 40). With these and other qualifications, however, Fidel set out the official position that support had to be given, since Czechoslovakia was "moving towards a counter-revolutionary situation, and this would have seriously affected the entire socialist community" (Castro 1968b, p. 41).

This amounted to support for the Soviet line that a country's right to national sovereignty, a principle which the Revolution had loudly and consistently proclaimed, had to give way in such circumstances to the "more important" rights of the "world revolutionary movement" (Castro 1968b, p. 44). Fidel attempted to use the Soviet line to provoke greater support from the USSR for Vietnam, North Korea and Cuba, in the interests of the world revolutionary movement. He called for a guarantee of similar Soviet military action in the event of U.S. aggression against these small socialist states (Castro 1968b, p. 48). Thus while Cuba did not offer unconditional support on Czechoslovakia, the qualified political support did constitute a major concession on the part of the Cuban leadership, and a turning point in Cuban foreign and domestic policy. The process of Cuba's integration into the Soviet bloc, and its political-ideological subordination and heightened economic dependence, thus began in August 1968.

1970 and the crisis of the ten million tons

These beginnings of a shift in Cuban policy towards the politics of the Soviet led bloc did not challenge the fundamental strategy of financing economic diversification, industrialisation and development through agriculture. This strategy had in fact been effectively underwritten by agreements made with the Soviet Union in 1964 to purchase an increasing amount of Cuban sugar, under a set pricing structure (see Rodríguez García 1990), these agreements contributing to the announcement of the ten million ton *zafra* in the same year. At the time hard currency reserves were strained and demand for imports had grown due to increased domestic consumption, and a national capital investment program involving the import of capital goods. Although not fully established, agreements like these with the Soviet Union were clearly threatened by the crisis in relations and potentially increased through alignment.

The Cuban model of sugar financed development meant that the country remained set in a conventional 'Third World' or underdeveloped model of exporting agricultural

commodities through labour intensive production processes, subject to the uncertainties of world market prices and exploitation stemming from unequal exchange (see Wallerstein 1983a, pp. 30-39; Castro 1991, pp. 25-40). The negative aspects of this were to be offset by the modernisation and mechanisation of the sugar industry, and the pricing arrangements made with the Soviet Union and other socialist countries (see Brundenius and Zimbalist 1990; Kagarlitsky 1995).[64] They were not eliminated however, making good relations with the Soviet Union all the more critical to the island's development project.

Given the politicised nature of the ten million ton campaign, when Fidel announced in May of 1970 that the campaign had fallen short of its goals by some one and one half million tons, a significant economic and political crisis was faced. Gonzalez (1974) claims that "Never before had the *líder máximo* put his own reputation so clearly on the line," such that failure risked producing "not only demoralization but also a pernicious cynicism among the masses" (p. 208).[65] In February Fidel declared that the ten million ton target would be realised (in Gonzalez 1974, p. 208), but three months later he was publicly seeking to turn the 'setback' into a victory.[66] While a major political crisis was avoided, the failure of the harvest and associated disruption of other sectors of the national economy reinforced the process of alignment with the Soviet Union.[67] It similarly reinforced the restructuring of the more radical aspects of the domestic economic organisation, like the absence of national budgets and income / cost accounting in state enterprises.

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[64] Despite these offsetting factors, Cuba's economy arguably continued to occupy a peripheral location in the division of labour, both within the world-economy and the socialist bloc. As is demonstrated in subsequent chapters, not all sugar was sold under these preferential agreements, and the prices within the socialist bloc continued to be influenced by capitalist world market prices (see Eckstein 1982).

[65] *Líder máximo* in the original quotation, translates as maximum or highest leader.

[66] The phrase "Convert the Setback into Victory!" (*¡Convertir el Reves en Victoria!*) was the title of one of several speeches by Fidel recorded in a special supplement to the *Bohemia* magazine in May, 1970 (see Castro 1970c).

[67] Some changes in government personnel resulted. Fidel noting in his July 26 speech of 1970 that "We have replaced some ministers - we had to - and will have to replace some more," but added that the main problem was not one of individuals, but rather "a problem of the whole people" (Castro 1970d, p. 7).

The accumulating problems of economic hardship, shortages and rationing were all compounded by the dislocation caused by the ten million ton campaign's mobilisations and disruption to other sectors of the economy. This broader disruption was caused primarily by the displacement of material and human resources from other industries at critical stages of the sugar harvests, particularly in 1970 (see Baloyra and Morris 1993; Pollitt and Hagelburg 1994; Brundenius 1984; Brundenius and Zimbalist 1990; Figueras 1994; Pérez-Stable 1993a). This in turn contributed to a structural imbalance in the national economy, as well as a falling rate of investment as a percentage of GDP (see Figueras 1994, pp. 35-64; Brundenius and Zimbalist 1990, p. 102). The economic turmoil combined with evidence of falling production and productivity across many industries, inflation and the growth of the black market, apparent chaos in planning mechanisms, and growing public discontent (see Eckstein 1994; Pérez-Stable 1993a). Codina Jíminez (1987) concludes that by 1970 "Many investments were paralyzed" (p. 133). Fidel acknowledged that the period had generated economic problems, discontent and resentment amongst the population, listing once again production problems and unfulfilled plans in a range of sectors, ranging from the beef and dairy industries in agriculture, to consumer goods like footwear (see Castro 1970d, pp. 1-5).

The extent of the economic crisis, and its decisive impact on the Cuban revolutionary model of political and economic organisation, cannot be overstated. Pérez-Stable (1993a) for example asserts that "the economy nearly collapsed" (p. 119), and that the resultant adoption of a Soviet styled model of socialism changed Cuba so much that 1970 marks the "end of the revolution" (p. 119). Eckstein (1994) describes the crisis as turning the "push for communism" into a "retreat to socialism," and cites potentially critical levels of labour indiscipline, low productivity, an excessive and unproductive bureaucracy, and other indications of general unrest (p. 40). Even Rodríguez García (1990) acknowledges the damage done to other sectors of the economy (p. 126), and the indirect consequence of increased dependence on the USSR as the failure to achieve planned levels of exports led to an increased trade deficit with the Soviet Union (p. 122).

Thus the first decade of the popular-democratic and independent socialist Cuban Revolution, and the *radical experiment* associated with these years, culminated in

serious economic and political turmoil. The evidence shows how throughout the 1966-1970 period of radical politics, and then the shift towards alignment with the Soviet Union, the underlying framework for national economic development remained essentially unchanged. Alignment with the USSR and integration into the CMEA brought substantial changes to national economic structures, organisations and practices to Cuba, but strengthened or extended, rather than changed, the underlying goals of increased production, foreign trade, investment, industrialisation and consumption. That is, the conception of the socialist revolution as a path to national economic and social development was extended, to be increasingly defined in terms of Soviet Marxist-Leninist political orthodoxy.

The climate of political radicalism, critiques of real existing socialism, and expressions of authentically independent revolutionary Cuban path to communism, continued to provide a potentially favourable context for an exceptional model of school education to be developed. Just as the fundamental development character of the revolutionary project was not challenged, however, the essential perception of secondary school education as an instrument in supporting the political and economic project continued. Whilst the resultant model of secondary schooling had some distinctive features, this perception translated into formal objectives of socialising citizens for the socialist state, with the appropriate attitudes, behaviours, and specialised skills required by development planning. World-system level structures and practices were used to pursue these world-system influenced objectives of secondary school education, even in this most radical and potentially period. This period then, establishes the basis for a world-systems geocultural explanation of secondary schooling in Cuba.

EDUCATIONAL DEVELOPMENT AND REFORM IN THE NATIONAL POLITICAL ECONOMY

Over the 1966-1970 period, influences on and intended objectives of secondary school education in Cuba, that relate directly to the historical context described above, are clearly identified. That is, formal objectives, reforms and practices in secondary schools based in the socialist and communist political objectives of the revolutionary government, and others tied directly to economic planning and objectives of the Revolution's development project. The period thus saw the extended implementation of

the work-study principle, culminating in the schools to the countryside (ESBACs) and first schools in the countryside (ESBECs) as the model of secondary schooling for the formation of the new socialist citizens. The structures for post-basic secondary academic or vocational specialisation were also extended, with an emphasis on technical and vocational training in identified key sectors of the national economy. In this context the new socialist citizen was increasingly presented in policy documents and statements, in terms of acquiring the skills, behaviours and attitudes required by good, productive workers.

These trends in the official objectives and outcomes of secondary education are analysed, including the school structures and practices developed to achieve them, and the underlying perceptions about the role of school education in society and its development project. From this, the world-systems influence on these processes is identified in the emphasis on preparation for work, through the centrality of the project for national economic development, and reinforced by the underdevelopment of Cuba within the capitalist world-economy. Wallerstein's (1992b) geoculture of the world-system, interacting with world cultural aspects of school education, accounts further for the basic objectives and structures of the secondary system being established in Cuba. A world-systems geocultural influence is found throughout the development of secondary school education in this period.

National political objectives

Closely in line with the radical politics being expressed by the Cuban leadership in this period, statements and formal policy for secondary school education consistently invoked the concept of the communist formation of students as a central objective of the schools. Implementing the principle of work-study across secondary school education, to the extent that all students were to devote a part of their school year (and for the future a part of every school day) to productive work, was the most radical reform of secondary school education linked to the socialist political objectives. Signs of this new approach to school education also being driven by national economic conditions and plans are identified, however, so that the political formation of students came to include their vocational orientation and preparation. That is, their ability and preparedness for

work in the area in which they could most effectively contribute to the project of national economic development.

Work-study and the new socialist citizen

In the context of expressed national independence within the socialist community, and the promotion of an economic and political strategy to quickly achieve an authentically Cuban communism on the island, secondary school incorporated and reflected this rhetoric. The new school was consistently cast as leading the way in raising the political consciousness of the new generation, as an integral part of the broader political and economic project. The systematic application of the principle of work-study was cited as a key strategy in achieving the heightened political consciousness and formation of the new generation. Aside from the political objectives, this emphasis on productive work contains an influence of national economic objectives, and the broader national development strategy, over the political project and definitions of students' political formation.

In 1966 Fidel referred extensively to the "deformation" of youth receiving a purely academic education, and criticised a socialist system in which the youth came to rely on the state or their family for all their material needs, without experiencing first hand how goods are produced (in Castro 1972a). In the same year he cited the early but still unsystematic applications of work-study, such as students' participation in specific tasks like the coffee harvest, as being "important from the point of view of their [political] formation" (Castro 1966a, p. 61). Statements like these set the background for the elevation of work-study to the main strategy for students' political formation.

School education to form the *hombre nuevo*, as presented by Che Guevara a few years earlier, already held a central place in the official educational statements and objectives, being presented as the basis for major policy decisions. The submission of the Cuban delegation to UNESCO's *XXX Conference on Public Education* in 1967, thus began with the assertion that "Cuba persists in her aim to develop a new concept of

education ... in order to bring about the formation of the new man, a man of conscience and knowledge, needed by our country" (MINED 1967c, p. 3).[68] The same year saw the appearance of a broadsheet from the Ministry of Education directed explicitly to this political objective: *Educación - Hacia el Hombre Nuevo Mediante la Educación Integral* (Education: Towards the New Socialist Citizen through Integral Education). Participation in productive work was to be a significant part of the (integral) education of the future, justified with Lenin's assertion that "It is impossible to imagine the future society without the combination of study with productive work for the youth" (cited in MINED 1967a, p. 7).

Detailed descriptions of the new socialist citizen, as perceived and articulated by the leadership and Ministry of Education, were put forward in official statements of school educational policy. The identified qualities and political objectives were closely linked to the concept of work-study, and in turn the emerging model of the 'school to the countryside' (ESBAC). In this documentation, the "new concept of education" proclaimed by the Ministry of Education was presented in terms of both the radical politics being expressed by the government, and the broader project of pursuing rapid, socialist development and growth (MINED 1967c, p. 3). In early 1968 the Ministry of Education set out the defining characteristics of the new socialist citizen, to emerge from their work-study, in this framework.

In political terms, the Ministry Of Education asserted that the new socialist citizen would be distinguished by their "total integration with the working masses" and "Absolute identification with the people" (MINED 1968b, p. 2). In addition, s/he would develop and express:

> love for the homeland and international progressive movements, evident in their faith to the principle of revolutionary internationalism, militant solidarity with peoples who struggle

[68] The expression "new man" is used here, rather than 'new socialist citizen' or 'new person,' since the citation is from an official English version of this document from Cuba's Ministry of Education, which translated the Spanish *hombre nuevo* literally as "new man." This was in line with the gendered Spanish language in which *hombre*, literally translated as 'man,' is used to mean 'man and woman'.

> for their freedom, repudiation of wars of aggression and hatred of imperialism which promotes them (MINED 1968b, p. 2).

It was thus intended that the politicised citizens would identify their individual interests with those of the wider socialist society. As a result of their education, and the concrete experience of participating in socially useful productive work and living in the revolutionary society, it was asserted that students would emerge from school willing to participate in any activity that served the interests of the Revolution. Having become aware of the value of this work for the whole society, the youth were to be motivated, in line with Che Guevara's vision, primarily by their raised political consciousness and commitment to the socialist project (MINED 1968b, p. 2).

The ideal vision of the new socialist citizen being publicly promoted in Cuba was clear. In addition to a commitment to the collective ahead of individual interests, students emerging from the new education would overcome traditional discriminatory attitudes towards the division of mental and manual work by practising both throughout their education. Through the application of work-study they would be 'integrally' prepared for, and able to recognise the social value of, both mental and manual work. In the words of the Ministry, they would be "ready to develop manual tasks of a productive character, or intellectual activities, without distinction, according to social necessity" (MINED 1968b, p. 2). Che Guevara, whose influence is apparent throughout these official expressions, was held up as the "ideal concrete expression" of the *hombre nuevo* to be emulated by all students (MINED 1968b, p. 3).

While ideal qualities such as these were consistently expressed by MINED, details of how this political formation was to be achieved, other than as a by-product of students participation in manual work, are less extensive in the documentation. What does emerge less directly, however, is the perceived role that the rapid economic development of the country was also to play in creating the conditions suitable to the formation of the new socialist citizen. That is, the objectives of the socialist project, and socialist education, were implicitly and overtly expressed in terms of material economic expansion and development. Educating the *hombre nuevo* thus meant involving students directly in productive work and training them for their future occupation. The Ministry expressed this synthesis as follows:

> The scientific-technological revolution, that follows the social Revolution, is oriented towards the maximum, rational use of human and natural resources ... to achieve optimum production as efficiently as possible ... [all of which] ... requires the promotion of a considerable number of intermediate and high level scientific and technical cadres. This scientific-technological revolution constitutes a stage of development in the formation of the new socialist citizen (MINED 1968b, p. 6).

The official line suggested that students would develop the identified characteristics of the new socialist citizen, and the desired political consciousness, by their direct preparation and training for their future participation in the project of socialist economic development. Most significantly, the statement from MINED implied that the specialised training of personnel for specific sectors of the national economy was central to the revolutionary project, the political formation of students, and hence the structure and function of secondary school education.

The vision of the new Cuban school thus involved a role for the school in the training and allocation of students for differential vocations. In the context of revolutionary Cuba, the participation of students in production, and their preparation for subsequent integration into the labour force, was a part of their contribution to the broader project of rationally planning the production of wealth and its egalitarian distribution. In this way the act of participating in the socioeconomic plans of the revolutionary government came to occupy a major place in discussion of students' political formation. According to the Ministry:

> the organisation of the youth and its vanguard ... to actively intervene in concrete tasks within the political, economic, social and cultural plans that are developed in the process of building the new society … [was one of the] … necessary avenues in the formation of the new socialist citizen (MINED 1968b, p. 7).

Hence it emerges that an instrumental or functional role of secondary school education was maintained in the radical period of Cuba's revolutionary project, tied to the priority given to national economic development and the need for skilled and committed labour to realise these objectives. It is also clear that this functional role for schools was

politicised in the sense that national development was a central part of the revolutionary political project. In this context, the schools to and in the countryside emerged as a means of institutionalising this political formation and preparation, through systematic participation in productive agricultural work.

Political formation and the schools to the countryside

The expressed principles and premises of the new socialist citizen, and the educational strategies to promote their formation, provided the basis and justification for the school to the countryside that emerged in this period. The Ministry of Education expressed this in 1967, stating that:

> the economy is an inseparable part of the life of a nation. The economy of our country … [and] … its development depend fundamentally on agriculture. Production [therefore] must be something that has a very close relation with the classroom programs in our schools (MINED 1967b, p. 2).

The strategy of development financed by agriculture, already established, had been adopted by the leadership in response to domestic economic problems and difficulties experienced in the attempt to radically diversify and industrialise the national economy, within the capitalist world-economy. The creation of the schools to the countryside (ESBACs) directly linked secondary school education to this development strategy, and were thus presented as a revolutionary means of simultaneously politicising the youth and contributing to agricultural production.

Under the ESBAC plan, urban secondary students were to be relocated to a "productive agricultural installation" for a period of thirty-five days each year, providing the opportunity to definitively break with the old educational thinking and routine, and move decisively towards a new style of general education (García Gallo 1967, p. 7). A pilot program, presented as a world first (including the socialist world), was trialed in Camegüey in the 1965-66 school year. García Gallo's (1967) official evaluation of the program declared that only such a model of secondary schooling was capable of forming "new cadres with a high scientific, technical and cultural level, conscious and active constructors of socialism and communism" (p. 8). Thus the assessment was based on synthesised political-economic rationale, the ESBAC allowing

students to engage in the "practical revolutionary activity" of production (García Gallo 1967, p. 8). In general terms, the Ministry claimed that this extension of the principle of work-study, and by implication the direct involvement of students in the national development project, was "the most efficient means" of forming the *hombre* nuevo (García Gallo 1967, p. 25).

The efficiency of political formation through the ESBACs, it was asserted, stemmed from students' direct contribution to socially useful production tasks. This was presented as helping to: "eradicate the individualistic mentality"; overcome the "verbalistic, intellectual and formalistic teaching of the past"; and "Establish close links between the school and life, theory with practice, teaching with productive work" (García Gallo 1967, p. 11). Fidel described the plan as constituting an authentic, "revolutionary pedagogy," celebrating in 1967 the "incredible enthusiasm" that students had demonstrated for productive work, and the associated benefits for their political-ideological formation given that "nobody paid them, they did not receive a single cent" (Castro, 1967, in Castro 1972a, p. 3). In this way, the importance of the new model to the policy objective of educating the new socialist citizen was firmly established.

In late 1966, the influence of the radical politics of the Revolution on this approach to secondary education was expressed by Fidel. In reference to the political potential of the ESBAC he declared that "the aspiration of our society, of our Revolution, is that one day both manual and intellectual work will be realised by practically everyone" (Castro, 1966, in Castro 1972a, p. 2). A new relationship, based on solidarity and political consciousness, was to be achieved between teacher and student, and in turn between them and the agricultural workers, towards realising this aspiration (Fidel Castro in MINED 1968f, p. 8). In the context of reduced wage differentials between traditionally high and low status occupations, and simultaneously de-emphasised material incentives and rewards, it was hoped that the social status of all types of occupations would also be equalised, given the importance of them all to the socialist project (see Brundenius and Zimbalist 1990). Universalising participation in manual agricultural work was thus a potential means of achieving students' identification with a new, revolutionary set of criteria for their occupational choices and perceptions, based on their contribution to the wider social good and realisation of government plans.

In this sense, the implementation of the ESBACs was based, at least in part, in the radical political objective of socialising students who were committed to the politics being expressed by the revolutionary leadership, and by implication prepared to contribute to its plans. The experience of hard manual work acquired by students was fundamental to realising the political objectives. This work gave students the opportunity to contribute in a positive and meaningful way to society, the product of their work being distributed for domestic consumption via the rationing system, and for export, thus contributing to the state's hard currency reserves. This quite radical reform of secondary school education marked a significant departure from the otherwise conventional structure of general secondary education being implemented. Through its extension of the work-study principle, the model carried the endorsement of Che Guevara, evident in his often cited statement:

> This is the form or education which best fits a younger generation preparing itself for Communism – the form in which work loses the obsessive character which it has in the capitalist world and becomes a welcome social duty which is carried out joyfully, which is carried out to the sound of revolutionary songs in an ambience of the most fraternal comradeship, of human contacts which strengthen both parties to them and elevate all (cited in Figueroa, Prieto, and Guitérrez 1974, pp. 4-5).

By the end of 1967 the then Minister of Education, José Llanusa Gobel, declared the pilot plan a success and announced that in the following year "the plan will be extended across the length and breadth of the country" (in MINED 1968f, p. 61). Aside from goal of universalising participation in the plan, the period of time spent in the school was to be extended to forty-two days, with the time systematically broken up between work and study. Films and conferences, to support and reinforce the political and ideological formation targeted by the new schools, were also planned (see Llanusa Gobel in MINED 1968f, pp. 57-74). The Minister of Education acknowledged the "favourable influence" that the new schools would have over production, but stressed that their fundamental objective was to "the formation of the youth of tomorrow" (p. 71). In the same speech, however, Llanusa Gobel noted that the "fundamental objective …[and] … most important goal of the Revolution," and one towards which all MINED comrades

and members of the Party must direct their efforts, was "to increase production" (in MINED 1968f, p. 74).

Statements like these provide support for the argument that this politically based reform of secondary school education linked from the beginning to national economic conditions, planned outcomes and priorities. Whilst students political formation was to be promoted through their productive work, in the context of production problems, shortages, and the strategy of increasing commodity production for development, it is reasonable to infer that the potential value or contribution of this production to the national economy was also a factor behind the reform. Within twelve months Fidel announced that this principle of programmed agricultural work and study was the preferred model for basic secondary and preuniversity for the entire school year, to be achieved through through the schools in the countryside (ESBECs and IPUECs) (see Castro, December 1968, in Castro 1972a).[69] The first ESBEC was opened in the 1968-69 school year (Figueroa, Prieto, and Guitérrez 1974, p. 5), though the new schools did not account for a significant number of students until the 1970s. The model and political commitment, however, were in place, institutionalising the ESBEC and IPUEC as the model for secondary school education of the future.

National economic development objectives

The previous chapter identified some of the influences that the government's economic program had over school education, largely in terms of preparing students for work in school by providing basic and then specialised skills or training, alongside the socialisation of desired attitudes and behaviour for productive work. The inherent goal of ever increasing rates of consumption, as a part of the island's revolutionary and socialist development program, combined with shortages and a range of production problems to reinforce this functional approach to secondary education in the late 1960s. The political formation of the youth had already come to rely extensively on their participation in work that made up a part of national economic plans. The specialisation

[69] The IPUEC was the Preuniveristy Institute in the Countryside (*Instituto Preuniversitario en el Campo*).

of educational training after the basic secondary level, with an emphasis on agricultural vocations and training in line with the policy of financing development through the export of primary commodities, was also extended in this period.

Thus the official perception of secondary school education in terms of its preparation of the future labour force, and hence as an investment in human capital linked to economic development planning, was extended in the 1966-1970 period. An emphasis on secondary schooling being directly articulated with national economic planning, and the specific strategy of agricultural led development, emerged in this period. This came on top of many references to the political-ideological role envisaged for secondary schools, and the ways in which this political formation involved an adequate preparation for and internalised commitment to work and the development project. The articulation of political objectives in these terms, I will argue, increased as the economic role and objectives of school education were heightened.

Secondary schools at the service of national economic development

Fidel had observed as early as 1966 that the volunteer work of secondary students in the coffee harvest of that year had been "economically important" (Castro 1966a, p. 61), in the broader context of efforts to maximise such hard currency earning exports (see Rodríguez García 1990, pp. 105-113). Some official indications emerge as to how the political formation of students was seen in terms of their effective participation in the national economy. Thus García Gallo (1967) observed that the school to the countryside would help to form a new generation "in work and for work," and that students programmed work efforts would help to instil "a communist attitude towards work" (p. 11). This desired and politicised attitude towards work involved students internalising the perception of work as a social duty, and that "a very important element of work is discipline" (p. 11). In these terms, García Gallo (1967) called for new subject programs for the secondary schools which would incorporate "the scientific and technical aspects of production," so that all students would "acquire the basic scientific knowledge ... [necessary] ... to adequately understand and apply work skills" (p. 21). In this way the political agenda for school education as expressed by people like Che Guevara, however idealistic, was narrowed to focus more on its functional role of training skilled workers.

Writing in support of the school to the countryside, José Nodarse (1967) addressed uncited criticism of Cuba's agricultural development path, outlining the argument that the reliance on agriculture in underdeveloped countries was one of the structural causes for their continued underdevelopment, the solution being a program of import substitution and industrialisation which de-emphasised the importance of primary exports in the national economy (pp. 26-7). Nodarse (1967) acknowledged and defended Cuba's "agricultural path for development within the international division of labour," on the basis that the ongoing modernisation of the agricultural sector would effectively transform it into a branch of modern industry (p. 27). Having defended the development strategy, Nodarse (1967) implicitly expressed the influence of this over secondary school policy by describing the ESBAC as a logical consequence of the strategy, and the related collaborative work of MINED and INRA. He expressed this more directly, noting that school education was "at the service of the scientific-technological-agricultural revolution and the economic development of Cuba" (Nodarse 1967, p. 27). This was clear evidence that school education policy was being shaped, in large part, by the state's strategy for modernisation and economic development. In this was the radical political reform of programmed work-study in the schools to and in the countryside, emerges as a Cuban application of the schools' role in training and preparing skilled, human capital.

An economic role for secondary school education was being consistently expressed and incorporated into formal policy in the late 1960s, connected to the priority of national economic expansion as a major part of the socialist project. This connection to the national political economy, and the importance of development to the revolutionary project, created the context for school education to be articulated and structured in these human capital terms. Further, these conditions allowed schools to directly support key industries through the provision of organised student labour, articulated as a part of the socialist reconstruction of schooling and a contribution to the socialist development project. Nodarse (1967) again provides an example of the specific attempt to link secondary school education to vocational training, in accordance with the priorities of national development plans, in an assessment of the new schools to the countryside:

> the building of an agricultural consciousness in the public and directing their vocational orientation towards technological

> careers and specialisations within agriculture and cattle raising, has constituted one of the principal objectives of in our country (p. 27).

The Cuban delegation's 1967 report to UNESCO publicly affirmed that the formation of the new socialist citizen was central to Cuba's educational plans (see MINED 1967c). The introductory remarks that immediately followed this affirmation, however, added that the educational project would carry forward the necessary technological revolution on the island so as to satisfy the needs of all citizens, and that this would be achieved in part by promoting a "love for work and the solidarity and fraternity of all human beings" (MINED 1967c, p. 3). Here too, the school to the countryside was endorsed as the ideal type of school for its articulation with national economic plans and goals. The submission noted that direct contact with agricultural production in particular was to leave students "convinced of the need to attain the technical development that will facilitate and increase the plans of food production" (MINED 1967c, p. 30). This was to be followed by students learning through the new schools the importance of agriculture "to the economic expansion of our country" (MINED 1967c, p. 31). Thus the official development strategy emphasising agricultural modernisation and exports, shaped the new schools through their intended outcome of instilling in students a personal and politicised commitment to this branch of the national economy.

Technical and vocational training and specialisation in secondary school

The system of three years basic (common) secondary education for all students, followed by academic or a range of alternative vocational specialisations, was extended in this period. This structuring of the national system of secondary schooling to directly train labour for specific industries and vocations, targeting those identified as priorities in national economic planning, provides strong evidence of the economic project shaping the development of secondary school education. The extension of this trend over 1966-1970 thus reinforced the economic or human capital function of secondary schooling by reinforcing the structures for sorting and providing specialised training for upper secondary students.

Cuba's 1967 report to UNESCO documents enrolment levels in the different types or sub-systems of secondary school education. Following basic secondary education, the main division was between ongoing academic study in the preuniversity institutes, or vocational specialisation within the 'technical and vocational' sub-system.[70] Other options included enrolment in teacher training schools; specialist sports schools; schools for the arts; or schools for the public health industry (see Primer Congreso de Solidaridad de los Pueblos de América Latina 1968; MINED 1967c). Specific types of vocational training within the technical and vocational sub-system included: industrial-technical schools and institutes; technical agricultural and livestock raising institutes; schools for fishermen (Kosichev); administration assistants schools; administration institutes; tabulation schools; language schools and institutes; and national art schools (MINED 1967c, Annex 1).[71] The full range of even more specific centres of study within these, and the types of qualification received, are listed in Primer Congreso de Solidaridad … (1968). In addition to this basic and upper secondary division, it should be noted that in this period specialisation within the level of basic secondary schooling was still considerable, primarily in some agricultural and industrial specialisations (see Primer Congreso de Solidaridad de los Pueblos de América Latina 1968, pp. 189-90).

An elaborate system of planning for the labour requirements of the national economy, and setting up the corresponding schools and institutes to prepare workers for the required industries and occupations, was thus well established in Cuba by the late 1960s. The emphasis placed on training within the technical and vocational sub-system was made explicit by MINED's (1968e) listing as a priority for the year "the demands of economic and social development and their implications for education" (p. 17). This

[70] The Spanish name for this sub-system is *Educación Técnica y Profesional*, translating directly as 'Technical and Professional Education'. The tranlsation I have used for this term uses the word 'vocational' rather than 'professional' for two main reasons. First, to emphasise the nature or character of the training in this sub-system, and distinguish it from the higher status or professional occupations resulting from preuniversity and subsequent academic tertiary level study. Secondly this translation is used in Cuban Ministry of Education documents published in English (see for example MINED 1994; 1992)

[71] These details are listed in Annex 1 of the MINED (1967c) document, outlining enrolment figures for each "level and type" of education. No page numbers are provided.

emphasis was also apparent in the proportion of upper secondary students enrolling in schools and instituted within the sub-system. In the 1966-67 school year around 19 percent of the total enrolments for secondary school were in the technical and vocational sub-system (based on figures provided in MINED 1967c, Annex 1). In this year, 46 005 students were enrolled in technical and vocational education, with at least 30 000 of these being at the post-basic secondary level, compared to 27 481 enrolled in preuniversity institutes.[72] Enrolment figures for the 1967-68 school year showed this trend increasing, with numbers for preuniversity at 16 779 compared with 45 612 for technical and vocational education (MINED 1968d, p. 95).

The specific nature of the level of technical specialisation at this level is also instructive. For example, within the industrial-technical schools, eleven new and narrowly defined specialisations were created. The areas of study included: "Measuring instruments and pneumatic control mechanics" and "Mechanics to assemble and repair industrial machinery" (MINED 1967c, p. 20). Students could emerge from secondary school as a 'qualified worker' (*obrero calificado*), in fields ranging from soldering or painting, to an accountant's auxiliary or dental assistant; or as a higher 'intermediate-level technician' (*técnico medio*), in for example agricultural soil and fertilisers, naval construction, or x-rays (for full details, see Primer Congreso de Solidaridad de los Pueblos de América Latina 1968, pp. 189-90).

Thus the combination of work-study through the ESBACs and planned ESBECs, at the basic secondary level, was to provide basic work skills, develop favourable student attitudes towards manual and specifically agricultural work, and encourage students through the politicised nature of the program to "pursue … [further] … studies that will prepare them to go into that important working sector" (MINED 1967c, p. 31). This general objective of the new type of secondary school education was expressed in the

[72] These approximate calculations made using the corresponding year levels of particular specialisations as outlined in the document in Primer Congreso de Solidaridad (1968, pp. 189-90), and enrolment figures provided for these in MINED (1967c). This calculation probably underestimates the upper secondary proportion in technical and vocational education, since many of the specialisaitons included in the basic secondary level extended into ongoing training at the upper secondary level, hence a proportion of those excluded in my calculation may well have been enrolled in the upper level.

1967 Congress of Solidarity between the Peoples of Latin America, asserting that the new schools would:

> Form and develop in students attitudes, habits and abilities that are relevant to the economic and social development of the country ... [and promote] ... a communist consciousness with respect to work ... [and] ... an effective vocational, occupational and professional formation (Primer Congreso de Solidaridad de los Pueblos de América Latina 1968, p. 125).

The evidence clearly shows that prior to the shift towards alignment and integration with the Soviet Union, and the subsequent period of institutionalisation in which the organisation of school education was increasingly influenced by the functionalist Soviet model, the basis for such a model had been well established. That is, a system capable of providing formally qualified workers, in the necessary quantities and with the appropriate disciplined attitudes towards work, for all branches of the economy as identified by central planning authorities. Further, students were already allocated to occupational paths granting differential qualifications. These were primarily the post-basic secondary qualifications of qualified worker or intermediate-level technician; possible primary school teacher qualifications; or graduation from preuniversity allowing enrolment in tertiary education and hence higher qualifications. As noted, some specialisations still provided for qualified worker level training to take place at basic secondary level, though the trend and intention was to phase this out (see subsequent chapters).

No significant change had occurred by the end of the decade, other than the disruption to upper secondary school level education as teachers and students were mobilised to participate in the ten million ton *zafra*. The application of work-study continued, Paulston (1971) noting that "by 1970 almost all secondary school students from all provinces were involved in some sort of part-time agricultural work" (p. 387). He adds that thirteen industrial-technological institutes and forty-five technological institutes were created to prepare skilled workers and agricultural technicians (p. 387). The influence of national economic plans over the structure and intended role of secondary school education can thus be clearly identified, as can its influence over the

political objectives of the school, and hence the expressed politicised project of educational reconstruction and expansion in Cuba

Socialist political formation as preparation for work

The presentation of the revolutionary or socialist project in Cuba, in terms of the island's social and economic development, continued over 1966-1970. With national development being a major part of the socialist political project, the emphasis on targeted vocational training in secondary school education became a major feature of the expressed socialist education. The first Congress of Solidarity between the Peoples of Latin America expressed and endorsed this policy position. In the forum, the major premises of the socialist political project, on which this vocational focus was based, were stressed in an attempt to demonstrate the radical political character of the educational reforms. Thus the Conference continued to describe, as a point of departure for the revolutionary government's educational policy:

> the integration or correlation that must be maintained between education and the plans for the economic and social development of the country, in accordance with the changes the revolutionary process has brought (Primer Congreso de Solidaridad de los Pueblos de América Latina 1968, pp. 128-29).

The Congress declared that the communist political education of students involved instilling in them a consciousness of "the importance of the social and economic development of the country" (Primer Congreso de Solidaridad de los Pueblos de América Latina 1968, p. 128). Alongside their polytechnical, aesthetic and physical formation, students' political-moral formation was described in terms of their developing a firm and conscious self-discipline, with a love for work and study and for the defence of the homeland (p. 137).

The radical politics of the 1960s has asserted an independent path towards socialism and communism in Cuba, in which these were simultaneously constructed, based in first raising people's political consciousness. This rhetoric was in contrast to the Soviet path of concentrating on building the material and economic base for socialism, from which it was envisaged that people's political consciousness would follow. The trend in school

education even in this radical period, however, clearly emerges as one towards emphasising its functional role within the national economy. The evidence provided in support of this argument is insufficient, at this point, to claim that this was the only or main objective of the reformed school education, or that the objective of politicising a generation in revolutionary and anti-capitalist politics had been lost. A reasonable inference can be made, however, that the response to national economic objectives was a major part of the secondary school education reform process, and that this extended to political objectives being expressed in terms of the national development goals.

Paulston (1971) affirms that both the political and economic functions of the school continued to be formally pursued by government policy, observing a "constant stress on educational-ideological activities ... as the central means of creating both the material abundance and social consciousness required by the sought-after ideal Communist society" (p. 391). As they had been throughout the decade, the goals were and remained both material abundance and raised political consciousness. The lines were increasingly blurred, however, as a raised political consciousness was seen as a factor in motivating the necessary work for growth and development. In turn, contributing to development was presented as a means of achieving a socialist political consciousness in students.

A decade of continuity in secondary school education policy

Secondary school education in revolutionary Cuba responded directly to the national political economy of the island, and the agenda of the revolutionary government. A framework was clearly established in which schools were formally presented as critical institutions able to contribute to the achievement of two basic objectives:

1. strengthening the political legitimacy of the new government, and support for its revolutionary and socialist political project; and
2. contributing to the immediate and future economic development of the country by training qualified, disciplined and politically motivated personnel.

Thus school education consistently sought to strengthen political stability and economic development. As domestic economic problems worsened, and the strategy of overcoming these through an agricultural export development model was put into place, secondary schools responded by training people for this sector of the economy, and directly involving students in agricultural work as a part of their formal secondary

schooling. Both goals remained, but as economic problems worsened over the decade, the influence of the government strategies for economic growth and development over the development of secondary schooling increased, at least at the level of formal policy.

Over the decade, I have suggested that the image of the new socialist citizen to emerge from the schools was redefined in terms of the heightened economic influence. The new socialist citizen as envisaged by Che Guevara was to develop through their education an authentic commitment to the collective human liberation, equality and solidarity, and be willing in accordance with this commitment to undertake any work that would benefit the whole society. This type of political or moral formation was presented as best achieved through the application of the work-study principle, in which students directly contributed to national economic goals and targets, produced goods of social value, and experienced the difficulties and importance of productive manual labour. This model for achieving the political objectives was progressively strengthened and extended as national economic problems worsened, and this aspect of school education was emphasised. In this context the new socialist citizen as an efficient, disciplined worker contributing to the Revolution's most important objective, the raising of national production and overall development, emerged.

This chapter cited literature arguing that concrete economic problems and constraints were significant factors behind the identified radical (political) experiment on the island in the 1960s. For example, political considerations alone did not produce the discounting of material incentives, and the attempt to motivate a hard working and efficient labour force through appeals to their political consciousness. In this example, material incentives were not a feasible option given the economic conditions (Zimbalist 1987; Eckstein 1982, 1994; Edelstein 1985). From the documentary evidence, a similar argument can be extended to secondary educational policy over the decade. As new structures were put into place to more directly support the underlying economic concerns, such as programs for work-study, an emphasis on training for agriculture and the school to the countryside, the policies were justified by reference to the socialist political objectives. By 1970 then, the human capital role of secondary schooling was being clearly expressed in public documents, but articulated as a radical political

orientation for the new school, given the centrality of the national economic goals to the state's socialist political project.

Education and the world-system

The model for economic development implemented and emphasised in revolutionary Cuba was essentially in line with its structural location as a peripheral state in the capitalist world-economy. In addition, the whole project of pursuing national development as a sovereign nation-state, seeking to minimise the negative effects of unequal exchange through developing value added manufacturing industries for export, was well within a world-system framework. Within this approach, the model of state directed investment, national production and foreign trade, and the corresponding state training and allocation of labour, was aimed at achieving industrialisation of the national economy to overcome its underdevelopment. That is, a project for what Chase-Dunn (1982b) describes as "national upward mobility in the world-system," fundamentally similar to processes used in post-war, capitalist Germany and Japan which "used state control and support of key industries to mobilize national development, albeit without the aid of socialist ideology" (p. 37)

From this perspective, the development of Cuba's national economic performance and policies in the 1960s were influenced by the capitalist world-system. These repeatedly return to broad level impact of the country's inherited underdevelopment within the world-system, and the political commitment to a program of national social and economic development in line with a world-systems geocultural influence. Revolutionary Cuba continued to feel the impact of capitalist world markets on the prices received for its commodity exports, and the negative consequences of unequal exchange in foreign trade. A dependence on imports for consumer and capital goods within this context led to a renewed emphasis on traditional primary exports to pay for hard currency imports. In their positive assessment of the historical achievements of Cuba's socialist economy, Brundenius and Zimbalist (1990) acknowledge that there is no country in Latin America "whose economic fortunes are not intricately bound up with developments in the world economy … [and that] … Cuba is no exception" (p. 143). This ongoing and often negative influence of the capitalist world-economy was formally acknowledged at numerous points by the political leadership of the Revolution.

At this level then, the argument for a world-systems influence on secondary school education takes shape. This occurred through the associated need for national development in socialist Cuba, and the strategy of achieving this through the expansion and modernisation of traditional agricultural industries, and a more gradual process of industrialisation and economic diversification. This influence is seen in the identified trends of: involving secondary students in direct agricultural production; emphasising their post-basic secondary training in related sectors of the agricultural industry; and more generally the emphasis on 'technical and vocational' training within secondary school education. Similarly, the principle of work-study, and its implicit intent to socialise students with positive, politicised attitudes towards work, can be linked to the world-system imperative for national development. The inference is that world-system level conceptions of national development, and government strategies to promote this within a nation-state, influenced the structure and intended outcomes of secondary schooling in Cuba.

On a second level within a world-systems approach, the argument for this influence is strengthened. That is, evidence of the secondary school education structures, underlying conceptions, and practices in Cuba being influenced by the geoculture of development. This is seen in the main objectives and perceived roles of secondary school education as expressed in official documents, and the actual organisation or structure of the institutions established to achieve these. The connection to the world-system can be seen through the shared nature of these assumptions, intended outcomes and institutional models established and reinforced in Cuba in this period. That is, primarily the notion of secondary school education as a way of preparing students for their future and effective participation in the labour force, by developing basic and specialised skills and attitudes required for the workplace, and also the concept of socialising politically loyal citizens of the nation-state through formal education.

These identified features of the Cuban school can be partially explained by the world culture or world polity perspective, in terms of the global spread of mass school education as a way to create members or citizens of nation-states (see Ramirez and Rubinson 1979; Ramirez and Boli 1987; Boli, Ramirez, and Meyer 1985; Boli and Ramirez 1986). That is, institutional or world cultural practices extending across nation-

state, political and economic boundaries, leading to a universal and standardised form of mass school education across the globe.

The evidence in Cuba seems to support such an approach, given the explicit recognition and attempt in Cuba to use school education to create socialist citizens of the socialist nation-state, and the casting of education as an individual right and broader social obligation in terms of its potential contribution to the national good (see Boli, Ramirez, and Meyer 1985; Boli and Ramirez 1986). The evidence also clearly shows, however, that national economic plans, above all those associated with expansion or growth and improved national economic performance within the world-economy, directly influenced the revolutionary government's expansion and reform of secondary school education.[73] Hence consideration of economic and interrelated cultural structures, processes, assumptions and beliefs, are required to explain the development of secondary school education in Cuba in this period.

Relying solely on a world cultural approach to explain the spread of mass school education in revolutionary Cuba misses the needed detail of these direct world-system and related national level economic influences, and their interaction with geocultural conceptions of schooling. The world-systems approach of a geoculture of development across the world-system (Wallerstein 1992b; 1995a), linked to the capitalist world-economy and compatible with world cultural accounts, can provided the needed detail for the case of Cuba. That is, liberalism's shared geoculture of development, including the belief in: national development for all sovereign nation-states; the achievement of this development through industrialisation and modernisation, via the rational application of science and technology; development and modernisation aided by the rational planning of a strong state; and greater equality and consumption for all to be achieved in the future (see Wallerstein 1995a, p. 49). This geoculture of the world-system can account for the emerging economic development emphasis in secondary

[73] In Cuba economic performance and objectives were set in universal measures of, for example, expanded GDP, national and per capita income, balance of trade, etcetera (see for example Rodríguez García 1990; Figueras 1994).

school education in Cuba, situating it in the context of this shared worldview of liberalism and the functioning of the capitalist world-economy.

School education to create members or loyal citizens of the nation-state, with this citizenship including a sense of obligation to the nation and working for its well being, are compatible with and related to the geoculture of development of the capitalist world-system. As emphasised in this chapter, consistent statements on schools preparing skilled personnel for national economic development in Cuba were increasingly linked to the socialist political (citizenship) formation of students and their moral and political commitment to make a contribution to the broader national development project. The structuring of basic secondary education to universally provide basic skills and attitudes (including attitudes towards work and towards the nation-state), followed by academic or vocational specialisation in upper secondary level, connect with world-system, geocultural conceptions of catch up style national economic development.

A fairly conventional model of secondary school education was established, with a politicised shift towards the schools in the countryside. The politicised schools continued to promote the world-system level objectives of creating loyal and politically committed citizens, and citizens with skills and attitudes required to contribute to the development project. The policy of targeting agricultural and other technical training in post-basic secondary schooling, and the intention to involve all basic secondary students in some form of productive agricultural work, closely followed the shift in national economic planning to a model of primary exports financing industrialisation and development. The combination of a direct national and world-systems economic influence over this policy, in combination with geocultural influences with respect to the roles and functions of public school education and the models and practices used to achieve these, is well illustrated in these developments.

The radical politics expressed in Cuba in the mid- and late 1960s provided a favourable context for a radically different conception of education and its structure to emerge. From the historical analysis, however, there is no doubt that the concept and structure of secondary school education that had emerged and was consolidated in this period shared this fundamental similarity to systems of school education across the globe. Clearly schools contributing to the communist formation of the youth was not a

formal objective in capitalist countries. Similarly, involving all students in productive work to instil an anti-consumerist consciousness was not widespread. Such specific features of Cuban policy and practice, however, emerge as specific and distinctive details on a common or shared basis of academic and then vocational school education to prepare citizens for work and life in the Cuban state. Further, school education in socialist Cuba was perceived and presented as a major factor in developing human resources who would subsequently make a more effective contribution to national economic development (see for example UNESCO 1971; World Bank 1980; Diez-Hochleitner 1965). This was necessarily linked to a geocultural assumption of economic development for all states across the world-system, in which school education was to play a significant role.

In summary, this chapter has argued that the principle of work-study, implemented through the schools to and planned schools in the countryside, was developed and articulated in terms of socialist political and economic development objectives of the revolutionary government. I have emphasised the impact of the latter through the direct shaping of post-basic secondary vocational education in accordance with the planned needs of the national economy, to realise development objectives. I have also argued that in this process, and the broader perception of school education in these terms, the political objectives of the new schools were influenced by the development project. That is, that political rhetoric about new socialist citizens, and corresponding attitudes towards work, were used to justify the economic function being assigned to schools. In the process, the political-ideological goals of secondary school education were re-defined in terms of the macro economic objectives.

Secondary school education policy, and the structures established in the radical political period, thus failed to fundamentally challenge the basic models of school education and its underlying roles and functions in society, that were held for example in developed capitalist societies. The policies put into place led Samuel Bowles (1969) to observe that "exams and grades still seem to be a central element in the motivation of students," and that the teaching practices generally in the new schools involved a "catechistic, authoritarian, teacher-centred approach characterised by a single teacher talking at a class of passive students" (p. 497). Such an assessment adds further support

to the view that the new schools had failed to fundamentally alter mainstream models of schooling, and extend this into specific processes and practices within the schools. These are addressed in more detail in subsequent chapters.

Critically, this similarity in terms of the perceptions of secondary school education, its potential contribution to development, and its content and organisation to achieve these, are well explained by a world-systems geocultural approach. World-system level influences shaped the educational response in Cuba's most radical political period, tying it to the central objective of overcoming underdevelopment with skilled and committed socialist citizens. In the radical political context of challenging the established socialist states and proclaiming the rapid construction of communism on the island, the world-system approach explains this orthodoxy in the construction of mass secondary school education.

Chapter III:

Rectification and institutionalisation, 1970-1976: Continuity in secondary school education

If these material constraints are not to impede the provision of education for all, we must link education with productive activity. It is clearly not only a vital educational principle that students should produce goods; it is also necessary for development…

- Figueroa, Prieto and Gutiérrez (1974)

INTRODUCTION

The first decade of Cuba's socialist Revolution produced dramatic results in terms of the expansion of formal and informal education. Six years of universal and compulsory, public primary school education had become a reality, with plans to include three years of basic secondary schooling in the compulsory level. Access to the new schools being constructed was equalised for all citizens regardless of race, gender, socioeconomic status, geographical location, and to a large extent, age, apparent not just in the expanded enrolments and participation rates but the provision of government scholarships for students to school and University.[74] This massive and rapid expansion of school education was clearly a distinctive feature of revolutionary Cuba's educational reconstruction in the first decade.

The preceding chapters have emphasised that, by 1970, two main tendencies or trends were well entrenched in formal school education policy. These were the objectives of using secondary schools to: 1) socialise a new type of socialist citizen; and 2) to contribute to national economic development by preparing and training these citizens for productive and efficient work. These twin objectives were identified as

[74] In addition to adults being included in the Literacy Campaign, adult education continued to be a major sub-system of the national educational system, with efforts shifting to the goal of achieving six years of primary level education for all adults, and structures set up for workers and farmers ongoing education at primary, secondary and tertiary level (see Kolésnikov 1983, pp. 106-113).

major features of the educational reconstruction. On this basis, I have argued that the expansion and reconstruction of secondary school education in revolutionary Cuba was conditioned by world-systems influences. This conditioning occurred through the imperatives of Cuba's structural location in the world economy, and the associated economic and geocultural conceptions of the functions of secondary schooling, and the type of school required to meet these. These influences interacted with and compounded national political economy tendencies to condition the nature of the educational reforms.

Events contributing to Cuba's shift towards alignment with the Soviet Union culminated with the failed ten million ton sugar harvest of 1970. Bengelsdorf (1994) notes that in 1970, "it was impossible to ignore economic failure, administrative chaos, and a general level of discontent in Cuba" (p. 99). In the aftermath of this economic project, and the subsequent domestic turmoil, major changes to the political economy of the Revolution ensued. The domestic politics shifted from the radical experiment of the 1960s to the Soviet style institutionalisation of the Revolution in the 1970s. Conventional methods of economic planning and accounting were reintroduced under the System of Economic Management and Planning (SDPE – *Sistema de Dirección y Planificación Económica*), as part of a more general shift away from the politicised approach of the 1960s to a more gradual and systematic approach to economic development, and Cuban socialism and communism.

This chapter first reviews the national context of the period, from the first signs of a shift in policy in 1970, to the First Congress of the PCC and the formal adoption of the socialist Constitution in 1976. The review focuses on the broad economic, political and social context and changes, including the national economic recovery based in more favourable world market prices and increased collaboration with the Soviet Union and socialist bloc. Developments in political and social policy, in line with the orthodox Soviet interpretation of Marxism-Leninism and its influence on Cuban politics, are also included, setting the climate for reforms in secondary school education.

Detailing the extensive change in the national political economy of the Revolution highlights some distinctive and contradictory processes with direct relevance for the analysis of school education. Moves towards greater and more formalised labour democracy, as part of the attempt to institutionalise some level of public participation in

work, politics and government, are seen to coincide with increased, hierarchical differentiation in work, social and political life. Evidence of this is seen in differential wages, occupational and internal management hierarchies linked to the SDPE, and the general reinforcement of a technical and political elite, as expertise rather than politics was emphasised. Through the combination of the Soviet and world-systems influence, the national context further constrained any radical potential, reinforcing the objectives of secondary schools to socialise politically loyal citizens prepared to fill differential occupations in the national economy.

On this basis, the analysis of educational development for the period is made. Events covered include: the 'First Congress on Education and Culture'; the subsequent revision of secondary school curricula and planning and elaboration of the national improvement plan; the extension and promotion of the schools in the countryside (ESBECs and IPUECs) and creation of elite, selective basic secondary and preuniversity schools in the countryside (IPVCEs); and the formal responses to education within the First Congress of the PCC and socialist Constitution. Policies for socialist political objectives are identified in the documents, including the systematic incorporation of the teaching of 'Marxism-Leninism' in secondary schools and the attempt to universalise the ESBEC and IPUEC model as the optimum practice of work-study. More significantly, economic development objectives are identified as increasing their influence, particularly in terms of the increasingly differentiated and selective post-basic secondary options, providing differential qualifications in line with the broader domestic reforms.

Having established a picture of the national context and shifts in national policy within the world-system, followed by a characterisation of the main developments and reforms in secondary school policy linked to this context, this chapter makes a number of main points with respect to the world-systems influence on Cuba's secondary schools. Firstly, through the review of primary and secondary literature, the whole process of economic and political reform and 'institutionalisation' in this period is seen to be based in the economic crisis on the island, and the subsequent influence of the Soviet Union. Within this reform context, increased levels of formal differentiation in work and social life emerged, based on academic and technical qualifications and

expertise. This formal differentiation was extended, despite the expressed moves towards greater democratic participation of citizens in work and government.

Secondly, this process is seen to have influenced secondary school education policy, extending existing trends in political and economic development objectives and their convergence in the latter. Specialisation in secondary school was reinforced and made more systematic, alongside the expressed belief in the ideology of the specialised division of labour for maximum efficiency, and hence development. Existing policies based in economic development objectives were extended, including a constant emphasis on training the required numbers of technicians and other vocational specialisations, and related efforts to promote students' vocational orientation in school. In addition, the selective and elite preuniversity institutes (IPVCEs) were established and officially promoted in terms of their ability to prepare the elite, or highly trained, section of the labour force required to oversee and manage the country's development program.

Thirdly, with respect to the world-systems approach to these developments, this chapter confirms the trends already identified. That is, the ongoing state of relative underdevelopment of the socialist state within the world-economy continued to reinforce the general emphasis on pursuing rapid economic development within the political project, now pursued under the Soviet model. This is contained within the idea of a shared geoculture of development, or liberal-Marxist consensus, with respect to the goal of national economic development guided by and for the sovereign and independent state. Consistent evidence of secondary schooling being seen by policy makers as an instrument of the broader project and strategy of national economic development supports this interpretation.

In addition, the world-systems influence, again through the geoculture of development, promoted and shaped the intended political formation or socialisation of students in secondary school, in line with world-system level conceptions and goals. Thus students' communist formation was expressed in world geocultural terms of creating loyal citizens who identified with national / state objectives, and hence were willing and prepared to work in the capacity that met both their personal and the broader societal needs. Into the 1970s this political formation increasingly involved uncritical

political-ideological conformity, and an acceptance by students of their metritocratically determined hierarchical position within the world of work.

This broad world-systems influence, over the general and specific objectives of Cuba's secondary schools, further promoted and entrenched their structure of basic or common academic and vocational training, followed by selective specialisation based on academic examinations. That is, a model of secondary schooling similar to that used throughout the world, to pursue fundamentally similar objectives. Like school education systems world-wide, and particularly those in 'developing' countries, Cuban policy emphasised such structures and processes directed towards maximising the economic development benefits of secondary schooling. The direct influence of the Soviet Union in this period reinforced, rather than created, these existing trends in Cuba.

THE NATIONAL CONTEXT: ECONOMIC RECOVERY AND INSTITUTIONALISATION

A period of political and economic reform followed the failed ten million ton *zafra*, amidst subsequent calls from the leadership to "overcome the so-called errors of idealism of the previous phase, mainly the desire to advance too rapidly" (Martínez Heredia 1991, p. 28). This period of reform is commonly referred to as the 'institutionalisation' of the Revolution (see for example Mesa-Lago 1978; Pérez-Stable 1993a). The implications of the period were widespread, from the creation of a formalised, national political structure, and a new body responsible for national economic planning, to a restrictive cultural and political policy ensuing from the new Marxist-Leninist political orthodoxy. Of course, all of these carried implications for the role and functioning of school education.

The impact of the economic dislocation and crisis of 1970, and subsequent political alignment with the USSR and economic recovery, were felt across all spheres of Cuban life in the early 1970s. In their analysis of the sugar industry in Cuba, Pollitt and Hagelburg (1994) conclude that by 1970, "the diversion of labour, transport and organisational effort from other activities left the rest of the Cuban economy in shambles" (p. 553). Even Rodríguez García (1990) concedes that, at least in part as a result of the ten million ton *zafra c*ampaign, "the fundamental economic objectives of

the strategy for development between 1965 and 1970 were only partially fulfilled" (p. 124). Evidence emerges that the failure of the harvest was symptomatic of a deeper and more serious economic crisis, demanding a coherent and wide reaching governmental response as a matter of political and economic survival.

The reforms that ensued brought an institutionalised structure for popular participation in work and government, albeit limited and contradicted by the inherent differentiation within the promoted ideology of an expert or vanguard sector. In addition, internal economic reorganisation combined with more favourable world prices and conditions to produce relative economic expansion and recovery. This in turn complemented the political institutionalisation in process. The expansion of education continued, increasingly focused on the secondary level and its articulation with the planning and patterns of social and economic development being promoted. The Cuban Revolution thus sought to establish in this period a basis for its long term development, e expressed in the Socialist Constitution of 1976.

From economic crisis to stability and expansion

Economic recovery

There is no doubt that the 1971-76 period brought significant economic recovery or growth to the island, although the main causes for this recovery remain open to debate and competing interpretation. Looking first to Rodríguez García's (1990) official economic history, the period is characterised as one of general "economic recovery" in which steps were made to re-establish the basis for the reproduction of the Cuban economy (p. 136). Political and institutional change is described in terms of it allowing a better system of economic planning to emerge, which in turn created the basis for the thorough restructuring from 1976 (pp. 132-36). Rodríguez García (1990) also notes the "reconsideration of the role of market relations," and the related "recognition of the

necessity to re-establish the socialist principle" (p. 134), all contributing to the improved articulation between the development strategy and the political economy.[75]

To illustrate the substance of the economic recovery, Rodríguez García (1990) cites an increase in the gross social product from 8.97 billion pesos in 1971 to 14.06 in 1975, an increase of some 57%.[76] Internally, he cites a 244.7% increase in total investments from 668.5 million to 2.30 billion pesos between 1970 and 1975; an increase in investment in construction and assembly from 43% to 52.3% of the total (p. 136); and an overall increase in sugar production from 5.95 million tons in 1971 to 6.44 million tons in 1975 (p. 138). Rodríguez García (1990) adds that domestic productivity increased by 41% for 1971-74, more than covering the 21% increase in salaries for the same period (p. 142). A similar positive trend is found in the external sector, with the value of imports increasing from 1.39 billion to 3.11 billion pesos, while exports grew substantially faster from 861 million to 2.95 billion pesos, almost producing a balanced foreign trade (p. 141).[77] Rodríguez García (1990) concludes that the period brought a "strong economic recovery in the country that allowed it to successfully complete the earlier period of creating the conditions necessary for the process of industrialisation" (p. 143).

Brundenius and Zimbalist (1990) also describe a domestic economic boom over the 1971-75 period, with real GDP increasing at a rate of 7.8% per annum (pa); non-sugar manufacturing increasing by 10.8% pa; engineering goods industries by a massive 24.5% pa; construction by 22.6% pa; and gross investments reaching 2.3 billion pesos by 1975, almost three times the 1970 level (p. 78). Pérez-Stable (1993a) uses similar language to describe a general economic expansion in the 1970s, peaking around 1974-

[75] This concept of re-applying the 'socialist principle' of differential remuneration for different work was a major feature of the reform, and the influence of the Soviet Union. It was frequently cited by the leadership as a justification of social differentiation and inequality, based on formal qualifications.

[76] Figures in Cuban pesos are not expressed in Australian or U.S. dollar equivalents, since the Cuban peso was not recognised internationally as a convertible currency. Figures for foreign trade expressed in Cuban pesos represent trade within the socialist bloc, whilst trade (and debt) outside these markets is recorded in $U.S. Within Cuba, the official exchange rate was approximately 1 Cuban peso : $1 U.S.

[77] Given the non-convertability of the Cuban currency, figures for foreign trade expressed in Cuban pesos represent trade wthin the socialist bloc, whilst trade (and debt) outside these markets is recorded in U.S. dollars.

75 (p. 131). Mesa-Lago (1978) also assesses the economic performance of the early 1970s positively, citing annual growth rates for gross material product rising from –1.3% for the 1966-1970 period to 13% for 1971-75, and a positive outlook for future growth at the time of writing (Mesa-Lago 1978, pp. 57-59). Brundenius (1984) describes a "vigorous recuperation of the economy in the first half of the new decade, with an annual growth rate of 10.0 percent in these years 1971-1975," this recovery following "the disappointing growth performance of the 1960s and the frustrating "great leap forward" policy of the 1969-1970 *zafra*" (p. 57).

Another area of national economic policy contributing to the recovery was the move to reduce excess currency in circulation. In 1971, this stood at 3.4 billion pesos, or a massive 84% of total income of the population, falling to 2.2 billion in 1973 and around 2 billion by 1975 (Rodríguez García 1990, p. 134). This occurred in the context of shift towards material incentives in the workplace, and hence was closely linked to the "socialist principle" of differential remuneration according to work. In addition, work norms were re-instituted throughout the country, such that by 1975 some 69 091 workplaces, covering 48% of all workers, had work production norms, while 20% of the workforce had their salaries tied directly to production output. According to Rodríguez García (1990) this contributed to current, and established the base for further, increases in productivity.

The general consensus about national economic recovery, from the turmoil and disruption of 1970, thus clearly emerges from the literature. On multiple economic indicators the national economy grew in the period, allowing ultimately for improved rates of consumption and accompanying social and political stability. The domestic upheaval and economic crisis of the late 1960s had been overcome, and the basis for a more gradual, long term strategy of social and economic growth had been put into place. The new policy relied less on political mobilisations and more on conventional market mechanisms. This feature of the institutionalisation was to be increasingly justified in terms of Soviet politics-ideology, in which the creation of the material basis for socialism, and then communism, was cast as the first priority of the political project.

Labour democratisation and the economic recovery

One significant feature of the early 1970s was the re-invigoration and democratisation of the trade union movement. Brundenius and Zimbalist (1990) note a high degree of labour dissatisfaction in 1970 based in the deterioration of the role and power of the trade union movement in the 1960s. This is evident in the Union elections of 1970, in which 87% of the 118 000 elected Union Officials were replaced (Brundenius and Zimbalist 1990, p. 124). Eckstein (1994) also emphasises this feature, noting the creation of over 26 000 new "union locals" following the 1966 Congress, and the subsequent high turnover of incumbents in the 1970 elections with just 27% re-elected (p. 42).[78] She adds that beyond the election of new officials and creation of new union branches, worker assemblies and meetings were again held with regularity, providing workers with opportunities to discuss "production targets, health and safety, worker education, and labor discipline … [and to] … air grievances against management" (p. 42).

The extent to which these changes contributed to authentic workplace democracy in terms of control over management and production decisions, and / or contributed to better productivity and hence, economic recovery, is of course open to debate. Brundenius and Zimbalist (1990) argue that while the politics of the period involved a critique of the idealism of moral incentives of the 1960s, and initiated their replacement with material rewards, the economic recovery in the early 1970s was not based on this policy shift.[79] Instead they attribute problems of worker indiscipline, absenteeism, and low productivity to the failure to develop effective or meaningful structures for worker

[78] Determining accurate figures on this process is problematic. Pérez-Stable (1993a) cites a figure of 75% of incumbent Union Officials being rejected in the 1966 elections, just prior to the CTC (Cuban Labour Confederation) Congress, adding that the full time personnel of the CTC was reduced by 53% (p. 114). She also supports Eckstein's (1994) figure of 27% of local delegates being re-elected in 1970 (p. 128), compared to Brundenius and Zimbalist's (1990) figure of just 13%. Regardless of the exact number, the turnover was clearly significant in both 1966 and 1970, supporting arguments in favour of a qualitative change with respect to democratic processes within the trade union movement at this time.

[79] Their main arguments against such an explanation are: the time lag in implementing the new policies; and the inability of material incentives to work effectively in the short term given the shortage of consumer goods – apparent in the high levels of excess currency in circulation.

participation in decision making. Thus they argue that the revitalised trade unions, with worker participation in tasks like setting work norms, amounted to a "shift in enterprise social relations … [that] … aided in the development of internal incentives as well as the elicitation of useful ideas for improving productivity" (p. 124). Brundenius and Zimbalist (1990) stress that heightened political consciousness, without "meaningful worker participation in enterprise and economy wide decision-making" (p. 138), had been insufficient in the 1960s to stimulate production and produce the desired economic growth.

Zimbalist and Eckstein (1987) similarly describe the freer elections and renewed emphasis on trade unions representing the interests of their members, and participating in the management and running of industry (p. 13). The role of this increased democracy in the economic growth and recovery of the early 1970s is asserted, given that "The government did not even begin to link wages to worker output until 1974 and the process proceeded very slowly thereafter" (Zimbalist and Eckstein 1987, p. 13). Zimbalist and Eckstein (1987) condition their appraisal of this policy, however, by also noting the 1971 promulgation of a "compulsory work law," which defined work as both a socialist right and obligation,[80] effectively addressed labour indiscipline. Rodríguez García's (1990) official interpretation also presents the renewal of the trade unions, in line with the official criticism of their decline, as a significant contributing factor to the broad economic recovery of the early 1970s. In particular, he asserts that in this period the fundamental directives of the first five-year plan, for 1976-1980, were elaborated with a renewed "participation of the workers in the process of developing the plan, particularly after the XIII Congress of the Cuban Labour Confederation celebrated in 1973" (p. 134). He adds that "the massive participation of all workers in the economic management of the country was institutionalised through workers production and service assemblies" (p. 135).

[80] The law referred to by the authors is most likely *Law No. 1231* entitled *del Deber Social de Trabajar (on the Social Obligation to Work)*, in which the state provision of employment for all according to their abilities was confirmed, with a range of sanctions for those not working without justifiable reasons (see Dorticós Torrado 1971a).

Some evidence emerges that the renewal of the trade unions, and through them the participation of workers in the workplace, contributed to the improved economic performance in this period. There is less consensus, however, on the nature of the new levels of democracy and worker participation. Brundenius and Zimbalist (1990), for example, acknowledge that while workers had more say in choosing their representatives and having input into work practices, their ability to "impose changes opposed by management, the Party, or the government remained limited" (p. 124). Going further, Mesa-Lago (1978) argues that the reorganisation of Unions was primarily "within the Soviet concept of transmission belts of the administration" (p. 114). Citing Raúl Castro, he asserts that despite the rhetoric of Unions returning to their defining function of representing workers' interests, even when these were in conflict with those of the revolutionary government or industry managers, their main function continued to be "to serve as a vehicle for the orientation, directives, and goals which the revolutionary power must convey to the working masses" (Raúl Castro, cited in Mesa-Lago 1978, p. 88).

For the purposes of this research, two important points emerge out of this process. First, there is agreement that the revitalised trade unions were used to increase national production. Whether this was a result of greater democracy and participation, or as argued by Mesa-Lago (1978) the result of the labour movement under the CTC making issues like efficiency, productivity and worker discipline priority union issues (pp. 92-3), the underlying goal remained greater production for national economic development. Secondly, however limited the input and decision making power or workers and their representatives at the workplace with respect to policy formulation, formalised structures of worker assemblies to discuss plans and their implementation amounted to substantive changes. Their potential for authentic socialist democracy, however, was contradicted by the 'socialist principle of work,' greater use of market relations, and other policies promoting an elite management sector separated from the majority in terms of decision making and control over national resources. Secondary school reforms were a part of this process, emphasising perceived economic benefits of specialisation ahead of any political goals promoting radical and participatory democracy. World-systems influences in this process are identified in this emphasis on hierarchical, segregated labour and technical and specialised training for efficiency in the economy.

Sugar, foreign trade, the CMEA and the world market

Factors other than the domestic policies and reorganisation were no less significant in the economic recovery. As noted above, the period involved a marked improvement in the balance of trade with the Soviet Union. This was largely attributable to Cuba's entry into the CMEA in 1972 and the associated benefits of preferential trade agreements and debt arrangements with the USSR. These coincided with exceptionally favourable world market prices for sugar, facilitating the simultaneous improvement and increase in trade with the West.

Zimbalist and Eckstein (1987) note that in addition to the domestic changes, both CMEA and Western trade and financing "came to be central in the regime's recovery from the political and economic crisis caused by the policies of the late 1960s" (p. 17). They conclude that the recovery in sugar was due more to "world sugar prices" than any internal "reorganization of production" (p. 17), citing the all-time high prices of 1974. They add that the Soviet Union responded by both raising its fixed price paid for Cuban sugar, and allowing Cuba to sell some of its quota on the world market (p. 17). The increased export earnings, particular hard currency earnings, meant that the level of external trade with the West was significant in this period, providing the hard currency in 1974 for Cuba to "import goods and technology from the West for the first time on a significant scale" (Zimbalist and Eckstein 1987, p. 17).[81]

This phenomenon was contingent on these particularly favourable capitalist world market conditions, however, and hence short-lived, while economic planning was increasingly linked to the socialist bloc through Cuba's full integration in the CMEA. Zimbalist and Eckstein (1987) note that hard currency loans contracted in this favourable climate would lead to future debt problems, while Eckstein (1994) adds that the postponement of accumulated ruble debt with the Soviet Union until 1986 was another major factor pushing for greater economic integration with the USSR and

[81] In 1974, two years after Cuba's full admission into the CMEA, some 41% of all foreign trade was outside the socialist bloc (Eckstein 1994, p. 47).

socialist bloc.[82] Zimbalist and Eckstein (1987) conclude that external conditions, following the high point of 1974, constrained national economic planning and any decentralisation by imposing resource shortages, with subsequent "low sugar prices and costly debt repayment obligations" further reducing "external accumulation efforts" (p. 19).

Rodríguez García (1990) notes the seriousness of the economic crisis by 1970, with the national commercial balance in deficit by over two billion pesos, the bulk of this being accumulated over 1968-69 (p. 127). He argues, however, that the complete socialisation of all the major industries other than agriculture within the island created the basis for a rapid rectification of problems, and that together with the accumulated experience of economic planning in the 1960s and the recognised need to quickly address identified errors, this provided "positive conditions to conclude the program for reconstruction of the national economy in a brief period" (p. 131). Here too, however, Rodríguez García (1990) affirms that this program for national reconstruction occurred in "even more favourable external conditions, following the entry of Cuba into the CMEA in 1972 and the signing of new agreements for economic collaboration with the USSR in December of the same year" (p. 131).

The important point to emerge from these analyses is that, whether based on favourable conditions for trade with the West, improved arrangements with the socialist bloc, or the combination of these in the early 1970s, the world-economy continued to impact on revolutionary Cuba's economic performance and national strategies. Further, as noted by Pérez-Stable (1993a), despite the rhetoric on reform and rectification, the events of 1970 had left the development strategy that had been adopted in 1964 fundamentally unchanged. That is, sugar production for sale on world markets, and the modernisation of the industry, continued to be central to plans for future industrialisation and development of the national economy (Pérez-Stable 1993a, p. 86).

[82] Eckstein (1994) notes that the hard currency (U.S. dollar) debt with the West grew from $660 million in 1974 to $1.3 billion in 1975, and then $2.1 billion in 1977, rising faster than hard currency earnings, such that the island shifting from "having one of the better to having one of the worst hard currency debt-export rations in the region" (p. 52).

Within this framework, the shifts from 1970 onwards towards the USSR, and the relatively stable economic accords with the Soviet Union and other members of the CMEA following Cuban integration, consolidated the agricultural development strategy in place.

This is affirmed by Rodríguez García (1990) who leaves no doubt that sugar was affirmed as the "principal export capable of covering the problems in the balance of payments that had arisen as a consequence of the plan for development" (p. 131). The shift was the replacement of unrealistic, politicised targets with high but consistently achievable ones. This was a a means of financing the expansion and modernisation of other agricultural, as well as industrial and construction sectors, enhanced by the favourable prices for sugar negotiated with the Soviet Union and CMEA (Rodríguez García 1990, p. 133). Highlighting this strategy, Rodríguez García (1990) details the average world (hard currency) sugar price per pound each year, and the price paid by the Soviet Union. Thus whereas in 1971 the world market price was 4.5 U.S. cents / pound, the Soviet price 6.11 centavos / pound.[83] By 1974 the world price has jumped to 29.66 U.S. cents / pound, prompting the Soviets to raise their price to 19.64 centavos / pound and allow Cuba to sell some sugar on the world market. The result was a return of 1.94 billion Cuban pesos for Soviet sugar exports, compared to just 655 million pesos in 1971. The following year the Soviet price rose to 30.4 centavos / pound, reacting to the world price that was by now in decline at 20.3 U.S. cents / pound, making sugar the source of some 2.65 billion pesos in Soviet exports (Rodríguez García 1990, pp. 138-39).

Once again this detail clearly illustrates the critical role of these world economic conditions on the economic performance and strategies of the Cuban development program. Favourable sugar prices and guaranteed markets, along with the gradual

[83] Rodríguez García (1990) cites all figures in Cuban centavos per pound, based on the one-way official exchange rate within Cuba of $1U.S. for $1 Cuban peso. While Cuban exports to the Soviet Union were sold for Cuban pesos, these export earnings became credits in rubles for Soviet imports, just as earnings from sales on the world market became hard currency credits for the Western imports. This clearly makes comparsions between the favourability or otherwise of Soviet against world prices problematic (see for example Brundenius and Zimbalist 1990, pp. 151-52).

mechanisation of the sugar harvest to 25.8% in 1975 reducing labour costs and increasing productivity, thus provided the basis for the economic recovery. These world level conditions in turn impacted on the prospects and strategies for the long term development plan.

Assessing the economic recovery

The Cuban economic recovery in the early 1970s was based in sugar exports, further reinforcing the strategy of financing development through agricultural commodity exports. Determining the extent to which domestic policy reforms contributed to the improved situation is less clear. The context of economic crisis and recovery provided the context (and justification) for institutional and policy changes. This context impacted directly on secondary school education.

Rodríguez García (1990) describes the determining factors for the recovery as being: the changed operation of the political economy of the country; the improved system of economic direction; the development of industry; better efficiency in sugar production; the positive role of the world market for sugar between 1973 and 1975; and the beginnings of the process of Cuba's insertion in the "system of the international socialist division of labour" following entry into the CMEA in 1972 (p. 143). In terms of the socialist project in Cuba, the alignment with the Soviet Union saw this increasingly defined in terms of the Soviet model, with an emphasis on creating the material and technical base deemed to be a prerequisite for the construction of socialism (see Mesa-Lago 1978, pp. 25-29).[84] Under these terms, the economic recovery was clearly a step forward in the socialist political project. In line with this perspective, Rodríguez García (1990) positively assesses the period in political and economic terms, affirming that the choice of the sugar industry as a "basic instrument" for the expanding

[84] This theoretical perspective of the Communist Party of Cuba can be found in its Programatic Platform, first developed in 1976, in which the social and economic features of the distinct phases of socialism and communism were spelt out. The fundamental line of economic policy was defined as industrial development, diversification, import substitution, and export expansion for gradual industrialisation and the creation of the material and technical base of socialism (Partido Comunista de Cuba 1978, pp. 55-74).

economic reproduction of the national economy, within the socialist division of labour, demonstrates the wisdom of this choice (p. 143).

Cuba's full entry into the CMEA in 1972, and subsequent integration of its economic planning with that of the socialist bloc, was a significant aspect of the new politics with implications for school education policy. The official government line in Cuba, expressed by Rodríguez García (1990), was that integration with other socialist countries:

> principally with the USSR … fundamentally guaranteed the process of expanded reproduction of the economy in this period, ensuring high and stable prices for exports and just prices for basic imports (p. 146).

This in turn produced a "more rational economic structure" within Cuba, via its "specialisation and development within this system" (p. 148). At this time, specialisation, expertise, and the rational use of these to raise productivity, were elevated in public policy (see Gutierrez 1972; Delegación cubana 1972; Rafael Rodríguez 1972a), setting the context for further specialisation, and selection, in secondary schooling.

Mesa-Lago (1978) notes that the economic reforms of the period brought positive results in terms of "industrial output, overall economic growth, and increased consumer satisfaction," but that this was achieved at the expense of the goal of creating the new socialist citizen, since the new policies were likely to promote selfishness, a degree of stratification, and small pockets of unemployment (p. 31). For Mesa-Lago (1978), the process of economic recovery and reconstruction was firmly based in the return to more orthodox methods of accounting and economic planning, symbolised by the increasingly important role of former PSP leader Carlos Rafael Rodríguez as:

> founder and chairman (on the Cuban side) of the "Cuban-Soviet Commission of Economic, Scientific, and Technical Collaboration; the deputy prime minister of foreign policy; the chief negotiator of foreign-trade agreements … the man with *de facto* control of domestic planning (p. 32).

In addition, he stresses the renewed emphasis on training and expertise rather than purely political credentials, and the strategic role of Rafael Rodríguez in this process (pp. 32-6). Edelstein (1985) similarly describes a shift in policy in a more "conservative direction" towards "dependent socialist development," with a greater share of national income allocated for consumption, material incentives to motivate individual work, and an acceptance of a degree of social inequality in terms of income and consumption as necessary to stimulate production (p. 188).

By 1976 the new System of Economic Management and Planning (SDPE) was being implemented, having been approved at the First Congress of the PCC in 1975. Zimbalist and Eckstein (1987) describe the SDPE as having, "on balance … a positive impact on the Cuban economy" (p. 15). They note that one of the first decentralising measures of the new system, initiated in 1976, was the legalisation of "certain private sector activity" (p. 15), providing opportunities for self-employment in designated trades like carpentry or auto repairs (p. 15). Pérez-Stable (1993a) adds that the SPDE introduced "relative decentralization, profitability criteria, material incentives, and self-financed enterprises," leading to a better range and quality of consumer products sold on state 'parallel markets' (p. 126).[85]

In summary, the economic recovery of the early 1970s took place in a context of domestic economic reforms in which the Soviet ideology of creating the material basis for socialism took priority. In the context of this political shift, and world market conditions and trade (and other agreements) in the CMEA facilitating an initial economic recovery, the climate was set for the decentralising or conservative domestic reforms. The fundamental policy of financing national economic development through commodity exports was reinforced, though the specific strategies for realising this shifted substantially. Private employment, material incentives for work, conventional cost accounting for self-financing enterprises, and market reforms in price setting ensued.

[85] The parallel markets were run by the state, selling consumer goods at significantly higher prices than those distributed through the ration system.

Most importantly for school education, the economic reforms consolidated notions of efficiency through specialisation (at the macro-level within the CMEA and domestically), alongside the primacy of economic expansion and growth and the continuation of the agriculture led policy. Fidel's endorsement of wage differentials, in terms of motivating work and efficiency, and the subsequent adoption by the CTC at its XIII Congress in 1973 of the 'socialist principle' of differential wages, further entrenched the shift toward and justification of differential status and wages for different occupations (see Mesa-Lago 1978, pp. 45-7). Irrespective of the actual role played by the market style reforms in the improved economic performance of revolutionary Cuba, they were a central feature of the post-1970 process of institutionalisation, and marked the national context in which the school educational response was articulated.

Social and political institutionalisation

A contradiction emerges between the hierarchical differentiation of workers and occupations, within the context of efforts to raise productivity and efficiency through specialisation and material incentives, and the expressed democratisation of the labour movement and its structured participation in decision making at the workplace. This contradiction extended to the political reorganisation under the institutionalisation process. This combined formal and systematic structures for popular participation in the system of *poder popular* (popular power), with the endorsement of similar hierarchical arrangements in the political and social systems.

Clear signs of this contradiction emerged in the First Congress of Education and Culture held in 1971, in which restrictive prescriptions towards all aspects of national cultural life were endorsed. These included definitions of acceptable and correct behaviour for students (see MINED 1971a; Castro 1971b; MINED 1971b). The process of mandating such prescriptions, down to the level of appropriate musical tastes and hair styles for the youth, implicitly contradicted notions of popular or radical, grass-roots democracy.

Greater potential for this democracy emerged in the system of *poder popular* approved in the I Congress of the PCC, as part of the restructuring of the country's

political and administrative divisions. *Poder popular* involved direct elections at the local level for delegates to municipal parliamentary assemblies (these assemblies described, at this level, as organs of *poder popular*). These municipal assemblies in turn elected representatives for provincial and national level assemblies. A formal system of political and administrative organisation and representation was established, with local participation structured through a requirement that local delegates make regular public reports (*rendición de cuentas*) to their electorate, at which the population could raise issues and hold delegates accountable. Thus, like the trade union reforms, the population were given a well defined and systematic structure for participation in local political life through *poder popular*.

Mesa-Lago (1978) describes the process of administrative restructuring as constituting the separation of powers and functions between the PCC, the Central Administration, and the Army, as well as the formal separation of legislative and executive power within the central administration. At this level, the national assembly held formal responsibility for 'debating' and approving legislation, while the Council of State was given administrative responsibility alongside the national assembly.[86] Mesa-Lago (1978) characterises the restructuring as involving the increased delegation of power from individuals to formal bodies and institutions. This was coupled with the socialist legality incorporated in the 1976 Constitution, the reorganisation of trade unions, and the expanded membership of the PCC and UJC further increasing the potential participation of the population in social and political life.

Edelstein (1985) views the creation of the institutions of *poder popular* as offering the population "expanded opportunities for participation, providing experience in governance and increasing the level of political efficacy" (p. 189). He concludes that "While the economic policy represents a conservative path, the post-1970 strategy is a shift in the opposite direction" (p. 189). Other assessments agree that the institutional,

[86] The extent of authentic 'debate' occuring in the national assembly since its creation is questionable. Pérez-Stable (1993a), for example, notes that once Fidel had spoken definitively on any issue, further discussion was effectively closed (p. 124).

administrative and organisation changes involved in the trade unions, the mass organisations, and the organs of popular power (particularly at the local or municipal level) brought a real increase in the possibilities for popular participation in government (see especially Lutjens 1996; Brundenius and Zimbalist 1990; Zimbalist and Eckstein 1987).

Conditioning this characterisation of a progressive shift to more authentic participatory democracy, however, Pérez-Stable (1993a) acknowledges that the restructuring also established a differentiated system of political leadership, administrative responsibility and formalised popular involvement (p. 123), but is sceptical of claims that the process 'separated' the Party from central administration. To this end she cites the formalistic role of the national assembly, meeting just twice a year, with the function of permanent legislature effectively belonging to the Council of State and Council of Ministers (*Consejo del Estado* and *Consejo del Ministros*) (p. 124). She adds that within just two years of their creation, the national assembly heard reports on the formalistic nature of the *rendición de cuentas* at the level of local government, and of falling attendance at such meetings. Viewing *poder popular* favourably in terms of its contribution to the efficiency of local industries and services, Pérez-Stable (1993a) concludes that the over-representation of PCC and UJC members at all levels meant that "The separation of political leadership, popular supervision, and state administration was not achieved" (p. 123).

The point being made by Pérez-Stable (1993a) highlights the contradiction. On one level, structures and processes for the participation of the population in work and local government were established. These were seemingly in contrast to market style economic reforms, involving the differentiation of the labour force and an emphasis on increased production and profitability. In addition, the reforms in representation, participation and governance were limited to questions of implementing centrally determined policies and decisions, within a differentiated system of political leadership. Signs of this include the centralisation of effective decision making power in the national assembly; the indirect connection with and accountability of the provincial and national assemblies to the population; and the tendency, reinforced by the Soviet influence, of using such organisations as a means of declaring unanimous support for

the decisions of the Party and its leadership. The socialist Constitution of 1976 formally entrenched the role of the PCC as the guiding or directing force of the Revolution and revolutionary policy, using mass organisations like the unions to implement policies (Gobierno Revolucionario de Cuba 1998a). In the process, the justified differentiation of society, according to technical-occupational or political expertise, was further endorsed.

The 'Sovietisation' of the Revolution

The economic, political and social reforms in Cuba in the early 1970s were influenced by the islands political and economic alignment with the Soviet Union. This held implications for all areas of policy, including definitions of socialism and communism and strategies to achieve them. This line consolidated the strategy of gradual development through specialisation in agriculture, as well further promoting economic development as the primary objective of the socialist project. Additionally, concepts like hierarchical differentiation between occupations, and support for elite cadres, technocrats and managers under the banner of expertise and administrative efficiency, were promoted through the Soviet influence. All of these elements fit well within a world-systems geocultural perspective, policy being shaped by the USSR.

Mesa-Lago (1978) goes so far as to describe the early 1970s as the "Institutionalization à la Soviet" of the Cuban Revolution (p. 112). He cites Soviet pressure on Cuba for economic and political-organisational reforms, although no specific evidence of this pressure is provided beyond the general economic predicament of Cuba and the apparent economic pay-off for concessions made by Fidel at various points throughout the period. Mesa-Lago (1978) emphasises a Soviet influence in the economic, political, trade union and administrative restructuring, evident in Cuba's incorporation into the CMEA, and Fidel's ideological conversion to the official Soviet interpretation of Marxism-Leninism and defence of its policies in forums like the non-aligned Conference on 1973. Within this critique he points out that the measures to improve labour productivity were based on the "Soviet style work-quota system" from 1970, while the return to self-financing for industries with material incentives was also in line with Soviet economic policy.

Edelstein (1985) observes that "Since 1970, Cuban concepts of economic organization and Cuban foreign policy have coincided substantially with those of the Soviet Union," and raises the possibility that such changes in policy "may well have been made on their own merits," rather than as a result of Soviet pressure or influence (p. 190). He goes on, however, to acknowledge that in the new policy framework, "Cuba is vulnerable to Soviet influence because a withdrawal of favourable trade agreements and aid would be disastrous to the Cuban economy" (p. 191). The more feasible account, outlined by Edelstein (1985), could include a recognition by the Cuban leadership of both the benefits and costs of the alignment. That is, the loss of a degree of political independence, and an assessment in the historical context that only this path could provide the stability and possibility for the necessary economic diversification and development needed for genuine economic and political independence (p. 191).

Zimbalist (1985) argues against Mesa-Lago's description of the Sovietisation of the Revolution, and in particular the characterisation of the SDPE as being "Soviet-styled" (p. 213). He asserts that the Cuban model has developed "in a more decentralized and participatory fashion than in the Soviet Union ... [and that] … These features, in turn, have had a salutary effect on performance" (p. 215). Rodríguez García's (1990) account highlights the economic benefits of the closer relations with the Soviet Union, endorsing the official line that Cuba's recovery was primarily the result of increased collaboration with and support from the USSR, and Cuba's better use and application of its historical experience in the creation of socialism and communism.

More recent work from within Cuba, however, has confirmed the view that the alignment with the USSR and Soviet Bloc carried with it the strict imposition of and adherence to the official Soviet line of Marxism-Leninism. In conditions more open to criticism of previous policy from within Cuba, the well known Cuban Marxist scholar Fernando Martínez Heredia (1995a) writes that in this period:

> Cuba submitted ideologically to the USSR, and anything that differed from this line was considered as being anti-Soviet and

> ideological diversionism ... Within the currents of Marxism it was affirmed that only the Soviet current was correct (p. 21).[87]

This outcome emerges in the analysis of secondary schooling, in terms of the emphasis on preparation for work, the reduction of political education to this economic focus and the learning of the Party line, and the conservative approach to students social life and behaviour. This is implicitly confirmed by Martínez Heredia's (1995a) description of the adopted official model of Marxism-Leninism as:

> a tragic use of the name of one of the greatest fighters for freedom and liberty in the twentieth century – [being] dogmatic, impoverished, dominating, authoritarian, exclusive (p. 22).

Hence, while the extent of the 'Sovietisation' of the Revolution may be open to further debate, recent work by leaves no doubt that economic integration included political and ideological allegiance on the part of the Cuban leadership and PCC.

This was the broad national context in which secondary school education was to expand, to meet the growing number of graduates from the primary school expansion of the first decade: improved economic performance, based in external trade with the USSR and world market and some domestic reforms; and the influence of Soviet ideology focusing on the material basis for the socialist project, excluding any criticism of the consequent policies and political line as expressed by Fidel and the Cuban leadership. The response of secondary school education in this context included attempts to improve its articulation with national economic development plans. Through this whole process a world-systems geocultural approach explains the broad direction and content of the reforms, whilst the direct Soviet influence strengthened these influences.

[87] Fernando Martínez Heredio was a former Professor of Philosophy in the University of Havana in the radical years of the Revolution, from 1963-1971, and one of the directors of the independent, socialist journal *Pensamiento Crítico*. He was awarded the prestigious literature prize from the *Casa de las américas* in 1989 for the text, *Ché, el socialismo y el comunismo*.

SECONDARY SCHOOL DEVELOPMENT AND REFORM IN THE NATIONAL POLITICAL ECONOMY

The extensive review of the national context, in this period of substantial change for revolutionary Cuba, has provided some indications of the character and direction of secondary school educational reform. This development of secondary school policy is set out in terms of political and economic development objectives, followed by an assessment of the world-systems influence in this development and subsequent conclusions for this period. The specific form and content of the secondary school reform in this period was in many ways directly influenced by Soviet thinking and educational practice. This influence strengthened efforts to link secondary schooling more directly to the hierarchical world of work, and promoted the first, systematic inclusion of students political and ideological education into the core curriculum, as another discipline or body of knowledge to be assimilated by students for educational success.

Through this process, political formation was reduced to the repetition of slogans (see Sexto 1995; Valencia Almeida 1995), whilst schools' selection of students for hierarchical educational pathways were justified on the basis of maximising the use of human resources. The Soviet influence essentially promoted and reinforced the existing trends identified as being conditioned by the world-systems influence. That is, a model of secondary schooling dominated by economic development objectives, providing differential and selective training for students in a way that justified their future location in the now officially endorsed, hierarchical work force.

Major events in the development of secondary school education

One of the most significant events in Cuba in the period was the *First Congress on Education and Culture* held in late April, 1971, with major implications for political education policy in schools, and definitions of 'correct' or appropriate behaviours under the strict ideological model. The Congress officially focused on the question of the role and place of education and culture within the Revolution. In the context of the shift in the official attitude towards criticism and other "deviations" from the official political and ideological line, it involved an extensive review of school education and became the basis of significant reform.

Some 2656 meetings involving 116 293 participants preceded the Congress, making close to 8000 proposals which were organised into the 11 Commissions of the Congress so as to "guarantee the necessary unity and coherence of the event" (MINED 1971a, p. 125). After discussing over four hundred papers the Congress produced a massive 5654 recommendations for educational and cultural policy, of which 3106 were approved. This is indicative of the scale of the review, and highlights the timing of such extensive reform, in the context of overcoming the crisis of 1970 (see MINED 1971a, p. 137). Within the declarations, language and recommendations of the Congress, the influence of national economic and political objectives are identified, and within these the influence of the world-system over the national context. The general lines and directions of the subsequent process of *perfeccionamiento* were articulated in the Congress.

Following the First Congress on Education and Culture, the revision of existing curricula and the development and inclusion of new subjects began, simultaneously instituting formalised political education and entrenching an emphasis on vocational preparation. Based on the ideology of constructing the material and technical basis for socialism, traditional academic subjects of Spanish, Mathematics and the Sciences were stressed in the revised core curriculum. The concept of work-study and model of the basic secondary and preuniversity schools in the countryside (ESBECs and IPUECs), initiated in the 1960s, were further developed and entrenched as fundamental principles in the expansion of secondary school education. Political formation was to be enhanced through students direct participation in productive work, whilst this systematic labour was increasingly seen also as a potential means of financing the required expansion of secondary school education, and ultimately contributing directly to the national economy. The creation of the elite upper secondary preuniversity schools (IPVCEs) was also justified politically in terms of the scientific and technological revolution, the application of its advances for development, and the need for highly trained experts or cadre to achieve this.

The Congress, curriculum revision, promotion of the ESBECs, and heightened political rhetoric of the advanced model of schooling being instituted within the restrictive Marxist-Leninist orthodoxy, all culminated in the longer term, planned

restructuring of general education along these lines. The program of *perfeccionamiento* involved a detailed and systematic model of the new curriculum and structure of general secondary education being completed in 1975, to be progressively implemented over a five year period. This process included the participation of Soviet Educational personnel, effectively institutionalising the trends and emphases that had emerged in recent years. That is, further support for basic secondary education providing general skills for all students and determining their optimal path of vocational or academic training at the upper secondary level.

The First Congress of the Communist Party of Cuba, celebrated in 1975, formalised the official educational policy (*política educacional*). In line with the institutionalisation, its main features were the commitment of the socialist state to providing free, secular education for all citizens, principles of equal access and opportunity, and school education for students political formation and vocational preparation. The adoption of the Socialist Constitution in 1976 similarly formalised the new model, as well as the state's relations with the Soviet Union and support for the Soviet Bloc of East European Socialist States.[88] The Constitution cast public education as both a socialist right and obligation of all citizens, in line with world-system trends, and reiterated its intended main functions of providing a minimum level of comprehensive education for all, and preparing the nation's youth for political and working life.

Within these events, and the accompanying educational laws, ministerial resolutions, statements and commentary, the major trends of national political and economic development objectives are found throughout the reform process. Developments based in these objectives reflect the influence of the national political economy, responding to the problems of 1970 and continuing the already well established assumptions about the role of school education in the developing socialist state. A detailed analysis of the laws, ministerial resolutions, statements and policies follows under the two main trends,

[88] This constitutional alignment with the politics of the USSR would remain in place until its revision in the ammended Constitution of 1992.

focusing on the connection between these and the complex of national and world-systems geocultural influences.

National political objectives

The intention of the government and Ministry of Education to give greater attention to the political objectives in school education was clear in the First Congress on Education and Culture of 1971, with a series of Ministerial Resolutions following. In the context of celebrating the Soviet interpretation of Marxism-Leninism, the Congress reaffirmed the consistent attitude under the Revolution that:

> education is not, nor is it able to be, apolitical or impartial, given that it is a social and historical phenomenon conditioned by the needs of the social classes and their struggles and interests throughout history (MINED 1971a, p. 205).

Education had been explicitly politicised in this way back in 1960, with the acknowledgment that the institution of the school was the main instrument available to the state to socialise the new generation into supporters of and participants in the revolutionary project (MINED 1960). The whole basis of the discussion of educational policy and practice was now set within the more specific, and restrictive, official interpretation of Marxism-Leninism. The Congress further observed that school programs and curricula had not adequately reflected the Government's revolutionary objectives, highlighting the ideological formation of students as "the most urgent" objective to be pursued in the subsequent restructuring (MINED 1971b, Tema 3, p. 9).

Official emphases such as this were usually presented in a way that briefly presented or alluded to some prior shortcoming, as justification for the policy. The details of how and / or why students ideological formation had become an "urgent" priority, for example, were not discussed. In similar fashion, MINED (1972a) observed that within the sub-system of technical and vocational education "some of our students have not formed a producers consciousness," as part of a general call to improve the work-study link in this sub-system (p. 17).

One of the main aspects singled out for attention under the heading of students' political-ideological formation, was the question of reconciling individual with broader

societal interests. To this end the Congress noted the need to reconcile "the social wealth and the personal well being of each member of our socialist society" (MINED 1971b, Tema 1, p. 13), and similarly bring the vocational interests of individuals with those required by the whole society into accord (MINED 1971b, p. 15). Political formation was thus presented as the way to resolve this potential conflict of interests, by promoting a consciousness in students in which they identified their own interests in terms of the collective and broader society. This objective connects directly with Boli and Ramirez's (1986) notion of mass school education as a means of socialising citizens in a way that "the dialectical opposition between state-sponsored nationalist collectivism and the individualism of the autonomous person is resolved" (p. 77).

The outcome of attempts to overcome individual-state conflict through socialist politicisation, was described in terms of:

> an ideologically and politically developed graduate with knowledge of the needs of the country, and with a thorough or complete disposition to work in any place where their services are required (MINED 1971b, p. 28).

Such a disposition was to be achieved in part through promoting students "respect for the established norms of social coexistence," and promoting patriotic values under the banner of "communist education." This, it was noted, would involve students having:

> knowledge of the political, administrative and juridical structures that represent the Revolutionary State; correctly use the symbols of the homeland; respect these symbols and the images and memories of the martyrs and heroes of the country (MINED 1971b, Tema 1, p. 31).

Thus while political consciousness was intended to help students to identify with the socialist and communist political project rather than just their own, personal interests, early signs of the form this education would take emphasised patriotism, exhibited through discipline, respect, and personal sacrifice.

Work-study and the schools in the countryside

The concept of work-study as an underlying principle of all students general education was consolidated in the early 1970s, finding its 'highest expression' in the ESBECs that were vigorously promoted as the demand for basic secondary schooling began to explode. As I have noted already, the main political idea underlying the principle was that through direct involvement in productive work students would not only appreciate the value of manual work, thus helping to break down old cultural distinctions between mental and manual work, but also identify this work (and themselves) as an active part of the political (development) project. The influence of economic objectives on this definition of political formation thus continued, and was extended as the broader political project was increasingly expressed in the world-systems framework of catch-up economic development.

This emphasis is clearly expressed by Fidel, at the inauguration of a new ESBEC, who affirmed that this new type of school would provide "the type of communist education linked to our educational development and to our economic development needs" (Castro 1971b, p. 7). Similarly, the then Minister of Education Belarmino Castilla Más (1973c) noted in Ministerial Resolution (hereafter RM) 143/72 that the ESBEC was "one of the principal plans of the revolutionary government for the integral formation of our youth, through their connection with the country's development" (p. 1).[89] García Gallo's (1973) reflection on the new model of secondary schooling followed the official line, citing its roots in the ideas of Martí, Marx and Lenin, Fidel and Che, and (in what Anderson (1997) labels the romanticisation of work) the official social and political fulfilment from assuming one's productive (functional) place in society (see García Gallo 1973, p. 19; Anderson 1997, pp. 604-606).[90] Thus García

[89] The abbreviated form RM is used for Ministerial Resolution (*Resolución Ministerial*), in line with the Cuban practice. All Resolutions are referenced in the text to the Minister for Education who signed them, by year.

[90] The quote from Che Guevara cited above (see p. 114), presenting an idealistic or romantic image of the new type of education incorporating productive work, frequently appears in Cuban documents justifying work-study [see for example \Editor, 1972 #311; García Gallo, 1973 #327; Figueroa, 1974 #354; Figueroa Araujo, 1975 #339].

Gallo alluded to the schools potential for "the real possibility to form man (sic) combining education, in its fullest sense, with productive social work" (p. 21).

The Ministry of Education's Juan Mier Febles (1973), concentrating on the economic justification for work-study and the concept of polytechnical education within the work of Marx and Lenin, affirmed the potential value of working with peasants and workers to students' ideological formation (p. 49). Writing for a UNESCO report, Figueroa, Prieto and Gutiérrez (1974) present the ESBEC and its productive work as "an element for moulding the new man (sic)" (p. 3). Again the model is presented as the logical extension of socialist thinking and the revolutionary experience within Cuba, with the work for the community developing students social consciousness, and the combination of physical and mental work a rejection of bourgeois education by linking the school with real life (pp. 15-16). Their report concluded that the establishment of "education within the context of Marxist-Leninist principles" was the "ultimate aim" of the national system, and that the ESBEC provided a "fundamental link" to develop students "civic duties so that they will participate consciously and actively in the building of socialism" (p. 25).

Max Figueroa Araujo (1975) records that by 1974 some 109 ESBECs were functioning with 54 500 students enrolled, and plans were being implemented for their "extraordinary quantitative expansion" in the five years to 1980 (p. 18). Critically, Figueroa Araujo (1975) noted that the *perfeccionamiento* plans, and the place of the ESBEC in them, were a response to:

> the great social demand to apportion, on the one hand, an adequate communist formation for the youth, and promote, on the other hand, the qualified labour force qualitatively and quantitatively required by the country (p. 19).

Again the dual roles and objectives of the new model of secondary schooling, and the underlying principle of work-study, were officially expressed. In this way, clear economic and political outcomes were expressed for the schools, whilst meeting economic requirements was frequently expressed as a part of the political formation of students.

Curriculum reform and the teaching of Marxism-Leninism

Alongside the reinforcement of the ESBEC model, as part of the general process leading up to the final *perfeccionamiento* plan, the curricula of general secondary education (and other sub-systems) began to be revised, in part to more systematically incorporate students' direct acquisition of political knowledge. The year following the Congress on Education and Culture, Castilla Más (1972b) established a 'Permanent National Commission for the Revision of Curricula, School Programs and Textbooks' to ensure that all subjects and content respond to the "necessities of the revolutionary process" (p. 42). Under the new Education Minister, José Ramón Fernández, RM 126/73 noted that student's ideological formation:

> is based in the revolutionary principles of Marxism-Leninism, is an uninterrupted process that must be developed through the focus of the diverse learning materials in the curricula of all types of school in the system, and complemented with the systematic study of theory to orient the practical activity of the students along firm and secure pathways in the construction of socialism and communism (Fernández 1973g, p. 80).

The resolution referred to the need for students' systematic acquisition of Marxist-Leninist theory, and the creation and incorporation of new subjects for General Secondary Education as a means of achieving this. Further, the resolution established the subject of *Moral Comunista* (Communist Morals) for year 10 and *Marxismoleninismo* (Marxism-Leninism) for year 11. The creation of curriculum material and texts was announced in conjunction with a group of the Central Committee of the PCC to oversee the process, and a call for their full implementation by the 1974-75 school year (Fernández 1973g, p. 81). Thus for the first time, specific subjects directed solely to students political education, were to be systematically introduced into the common curriculum of secondary schooling.

Within a year, RM 02/74 established a Commission to analyse and revise the syllabus and teaching in preparation for the new subjects, and the general Marxist-Leninist orientation of all content (see Fernández 1974a). The Commission's work was to be oriented by the Party schools, with the final syllabus, curriculum and bibliographic materials for the teaching of Marxism-Leninism presented to the Internal Education

Department of the Central Committee of the Communist Party (hereafter DEICCPCC) for adoption (Fernández 1974a, p. 104). Ministerial Resolution 03/74 specifically mandated the inclusion of the subject *Moral Comunista* in the curricula of ESBECs for two hours a week in year 10 level, beginning in February 1974 (Fernández 1974b, p. 105).[91]

Given this incorporation of Marxism-Leninism into the general curriculum, and the commitment to organising its study throughout the different types and levels of education as one of the "principal tasks of the Ministry of Education" (Fernández 1974c, p. 114), teachers for the new subjects were required. Thus Fernández (1974h) established in RM 152/74 the creation of a "National Centre for the Training of Teachers of Marxism-Leninism," also under the guidance of the DIECCPCC (p. 114). The following year RM 285/75 noted that two (one-year) courses had run for existing teachers to be trained in the subject of Marxism-Leninism, but that a shortfall of teachers still loomed as the new political subjects were progressively incorporated into the secondary curriculum under the *perfeccionameinto*, from 1975-76 to 1980-81 (Fernández 1975c, p. 219). In response to this, Fernández (1975c) established more short courses for Marxism-Leninism teachers, and longer term four-year teacher training courses for specialist Marxism-Leninism teachers with knowledge of "philosophy, political economy and scientific communism" (p. 119).

The detailed plan for the improvement of the structure and content of general education (*perfeccionamiento*) was finalised and a program for its implementation mandated in 1975 (see RM 210/75 & 211/75 in Fernández 1975a; 1975b).[92] An effort to "ensure the communist formation of the new generations" was central to the

[91] At this time, basic secondary schooling consisted of four years (year 7-10), and upper secondary or preuniversity a further three years (year 11-13). An extra year of secondary schooling had been added in the 1964-5 school year (see Kolésnikov 1983, p. 134). Basic secondary was reduced back to three years with the *perfeccionamiento plan* introduced under RM 210/75 (Fernández 1975a).

[92] As noted above this process and plan for restructuring is generally referred to simply as *perfeccionamiento*, the full title in Spanish being: *El perfeccionamiento del Sistema Nacional de Educación*. As is clear in the analysis that follows, and indeed as articulated by Minister Fernández (1975a) in RM 210/75, the major thrust of the whole Reform Plan was "the restructuring of the Sub-system of general education" (p. 104).

restructuring, described as part of the Ministry of Education's "mission" in RM 210/75 (Fernández 1975a, p. 104). Under a world-systems geocultural, and the specific Marxist-Leninist political influence, *perfeccionamiento* lifted the level of obligatory education to basic secondary (year 9) level, and foreshadowed its intended future extension to include upper secondary level. The single, core curriculum established for the sub-system of general education, included the incorporation of three political subjects within the Social Sciences discipline, replacing the earlier subject of *Moral Comunista.* The subjects were:

1. Political life of my homeland (*Vida política de mi Patria*) for year 4;
2. Fundamentals of political knowledge (*Fundamentos de los conocimientos políticos*) for year 9; and
3. Fundamentals of Marxism-Leninism (*Fundamentos del Marxismoleninismo*) for year 12 (in Fernández 1975a, p. 106).

Other new subjects included 'Bases of Contemporary Production' for year 10 and 12, presented as being critical to students' political (and theoretical) development; and 'Astronomy' introduced in year 12, with "extraordinary importance" for students' attainment of a "materialist conception of the world" (Fernández 1975a, p. 106).

The year 9 subject amounted to 80 of the total 1120 hours of study mandated in the curriculum, making up 7% of the content in year 9 and around 2.5% of the content for year 7-9 (as a proportion of the total hours of study). These proportions were the same for *Fundamentals of Marxism-Leninism* in preuniversity (year 12). In comparing the new "single plan" adopted for general education, Minister Fernández observed that in terms of classroom hours, the subjects dedicated to students political formation had increased from zero to two hundred hours, or 1.6% of the year 1-12 total, while 'Bases of Contemporary Production' added a further 240 hours (1.9%) and 'Astronomy' 40 hours (0.3%) (in MINED 1975c, p. 34 - Anexo No.8). This incorporation of explicitly socialist political subjects, to formally educate the youth in the political thought of Marx and Lenin, combined with the official call to orient the content of all subjects around a

materialist or scientific conception of the world.[93] This was clearly a qualitative step forward in the institutionalisation of the students political education, and a significant part of the broader *perfeccionamiento* process.

In this light, an article from MINED (1975b) describing the *perfeccionamiento* noted its intention to bring about a thorough and complete restructuring of general education so as to create the model for the school of the future. This model in turn, it noted, was to "Create, through the structuring of the new programs, the necessary conditions to form the Marxist-Leninist conception of the world in all students" (MINED 1975b, p. 25). Reflecting on the process Prado García (1975b) emphasised "the preparation of the young generation for its active and conscious participation in the building of Socialism in our country" (p. 3), and explained that the restructure was based in the advance of the socialist world towards communism, the scientific and technological revolution, the deepening crisis of world capitalism, and the upsurge of the ideological struggle (pp. 5-6).[94]

The strategic role assigned to secondary school education by the leadership directly and implicitly throughout the documentation makes it, more than any other institution, responsible for the communist social, political, and moral formation of the youth. This task was made all the more pressing given the large numbers enrolled in education, Prado García (1975a) noting that in 1974-75 approximately one in three people were enrolled in some type of education (p. 67). The total enrolment in basic secondary alone, in 1975-76, was 382 643, almost doubling to 677 590 by 1980-81 (cited in Varela Hernández et al. 1995, p. 105; MINED 1995a). Elaborating on the teaching-learning process, Prado García (1975a) affirmed the school's responsibility for students' "structural communist formation, within which the individual naturally works, acts, investigates, thinks, reacts and feels like a communist" (p. 69). Mier Febles (1974)

[93] See for example MINED (1976), which noted the general revision of all subject content and materials in accordance with the scientific conception of the world (pp. 72-99).

[94] The author, Luis Prado García (1975b), was apparently working within the Vice-Ministry of General and Special Education, hence the optimistic rhetoric.

similarly affirmed that the *perfeccionamiento* of the schools content and objectives was based in the "great communist objective of bringing to the Cuban youth a solid and scientific ideological base" (p. 41).

In light of more recent work in Cuba, and the general critique of the Sovietisation of the Revolution in this period, this systematic institutionalisation of students' political education was problematic. Rather than the thorough process described by Lenin (1977) in his 1920 address to the Union of Young Communists (pp. 203-17), in Cuba it involved the uncritical assimilation of content imparted by teachers, as implied by Martínez Heredia (1995a) above. Subsequent chapters show how this content increasingly centred on PCC documents and speeches, potentially undermining the development of authentic communist convictions in students. Leaving the effectiveness of the new subjects aside, however, this reform can be seen as a clear and substantive attempt to use formal school education to socialise politically loyal citizens, with attitudes and values corresponding to the political structures and project of the nation-state.

Communist formation for economic development

Some indications of these politically based reforms being influenced by economic objectives have been noted. In a review of educational laws under the Revolution, Hernández (1979) characterised the *perfeccionamiento* process as a strategy to "ensure the communist formation of the new generations" (p. 85). This communist formation, however, was presented as the end result of a process that would:

> adapt the structure of the system, its content and focus, teaching methods and textbooks, to the advances of science and technology, so that they are in correspondence with these advances and with the plans for the social and economic development of the country (p. 85).

In this way, the reform process of the early 1970s extended, rather than fundamentally changed, the trend towards convergence, such that the radical political outcomes reflected the economic development character of the political project. To be sure, the restrictive 1970s meant that formal communist education increasingly involved behavioural objectives, ranging from students personal appearance (see Fernández

1973d) and other "correct habits of behaviour" (Prado García 1975a, p. 76), to appropriate expressions of love and respect for adults, leaders, the homeland, and the (Soviet led) socialist bloc. Many of these behavioural objectives were also connected with the underlying goal of supporting economic development.

This general approach to secondary school education is also apparent in Fidel's report to the First Congress of the Communist Party of Cuba in 1975. After the public critique of the idealistic economic and political strategies of the 1960s, which in deference to the Soviet model being adopted were described as "actually pulling away from the correct methods of first building socialism" (Castro 1975b, p. 128), Fidel described the "intensive work" (*perfeccionamiento*) to adapt education "to the society we are building" (Castro 1975b, p. 144). He went on to note that students would receive not just political training, but "intellectual, scientific, physical, moral, aesthetic, polytechnical, labour and patriotic-military preparation" (p. 144). The signs were clear that under the Soviet inspired politics, students communist political formation very much involved their preparation for work.

School education and the socialist Constitution

Cuba's socialist Constitution, adopted by referendum in 1976, marked the ultimate documentary expression of the political and economic alignment with the Soviet Union and socialist bloc. For example, the document formally acknowledged the "proletarian internationalism, fraternal friendship and cooperation of the Soviet Union and other socialist countries" (Gobierno Revolucionario de Cuba 1998a, p. 1). Article 19 entrenched the "socialist principle" of "from each according to their ability; to each according to their work" (p. 5), allowing for increased wage and occupational differentials and subsequent differentiation in schooling. The Constitution also formally endorsed the *política educacional* adopted at the First Party Congress, affirming that the school education policy generally was based in "the scientific conception of the world, established and developed by Marxism-Leninism" (p. 8). This expression would recur with greater frequency into the latter 1970s, often acting in practice to promote an essentially liberal, world-systems world view that emphasised human faith in rational science and technology, applied by humankind to nature, for development and progress.

As noted by Marí Lois (1995), such a conception of the world was compatible with that promoted in capitalist schools.

The socialist Constitution also entrenched the concept of state provided free and universal school education, amounting to a basic or core preparation for every citizen. The Constitution further affirmed the centrality of the communist formation and preparation for life of the new generations, the achievement of this resting in:

> combining general education and the scientific, technical or artistic specialisations, with work, research for development, physical education, sport, and participation in political and social activities and military preparation (Gobierno Revolucionario de Cuba 1998a, p. 8).

Here again the communist political formation of students seemed to be a consequence of their active participation, particularly at work, in society and the political project as expressed by the political leadership. Teachers were subsequently directed by Minister Fernández (1976e) to promote students knowledge and understanding of the new Constitution, and particularly its differences with the Bourgeois Constitution of 1940; the "revolutionary character" of the text; and the "rights and obligations" of students enshrined in the document (p. 114).

New policies and reforms for secondary schooling, under the banner of national political objectives, were substantial in the 1970-76 period. The centrality of the objective of students' communist formation, through formal schooling, was itself affirmed and formally enshrined in policy and Party documents, and the nation's Constitution. The model of work-study was extended, in part, as a strategy to enhance this communist formation by involving all students in politicised work activities. Most significantly, subjects were included in the national curriculum to directly educate students in Marxist-Leninist politics. This systematic effort to socialise the new generations in revolutionary politics suggests a real influence for national, anti-capitalist forces in the new schools, in contrast to schools found in capitalist countries within the world-system.

Within these more radical reforms, however, examples of a world-systems geocultural influence are apparent. The new content was to be largely taught, and

assessed, in the familiar structures of teacher led classes. Aspects of the new content were arguably in fundamental accordance with the geoculture of the capitalist world-system, emphasising science and technology for progress and economic development. Most importantly, the political objectives, and communist formation, tended to converge with and be defined by world-systems conditioned objectives of national economic development, which in turn promoted conventional reforms and practices in secondary schooling.

National economic development objectives

The trend in the first decade that conceived of the school as a means of supporting this development, by preparing students with skills, attitudes and a vocational orientation required for work, was strengthened considerably in this period. This situation developed as a result of economic development objectives, still often expressed as parallel and complementary goals of schooling, coming to dominate secondary school policy and reform. This process was based in a combination of pragmatic responses to economic necessity, and the entrenched and now further promoted centrality of 'development' to the socialist project in 'underdeveloped' Cuba. From this, the conditioning role of the world-systems influence is identified, simultaneously structuring the historical underdevelopment of the country and affirming geocultural strategies and accompanying educational models for development.

In examining the influence and presence of national economic development objectives in the reform and restructuring of the period, the significant educational events, and the relevant educational laws, policies, statements, and internal analyses, are cited as evidence of this influence. The evidence for this section sets out the main aspects of the broad economic influence, and its manifestation in policy through the period. Hence the policies, statements and structures are analysed, in relation to economic goals. These include work-study and the schools in the countryside, and the general emphasis on students' vocational specialisation and preparation for work.

The general context

As part of the general critique and review of the revolutionary policy and experience that took place in the early 1970s, some specific problems confronting secondary school

education were publicly raised. These included concrete organisational problems, such as a shortage of secondary school teachers; the inadequate level of training and qualification of existing teachers; insufficient resources to finance the necessary expansion of secondary education; and problems with high rates of student repetition of year levels and associated low retention rates. All of these undermined the cost efficiency of school education, and its intended contribution to national economic development.

Thus Fidel noted in 1972 that promotion and retention rates were low, 73.7% of all secondary teachers lacked formal qualifications, and 22 000 new secondary teachers were required over 1972-76 with only 1990 graduates expected under the then current enrolments (Castro 1972b, p. 20). This in turn provoked a call by Fidel for "a movement within graduates of secondary basic school beginning this year," to provide the necessary teachers for the 40 ESBECs opening in 1972 and the 120 planned for the coming year (p. 23). This in turn led to the creation of the *"Manuel Ascunce Domenech" Pedagogical Brigade*, involving basic secondary school graduates moving directly into secondary teacher training and work, as "emergency and special plans for the training of teachers" (Ferran 1974, p. 20).[95] Under encouragement from Fidel, the PCC and UJC, enrolments in the Pedagogical Brigade increased, with a projected total enrolment of 18 592 for the 1975-76 school year. The Ministry of Education was to construct special Pedagogical Units for students working in the Brigades, to provide their formal training (Ferran 1974, p. 28).

JUCEPLAN confirmed in 1973 that up to one in four students were repeating a grade, and that serious problems were faced in the provision of teachers and physical resources for basic secondary education with the total enrolment for 1972-73 being some eight times that of 1958-59 (Junta Central de Planficación 1973, p. 8). Their report notes that the ESBECs had the highest promotion rates, and that this, on top of students' agricultural production and their sports and recreation activities, led them to "positively

[95] Students in the Pedagogical Brigades undertook twenty hours of work in the ESBECs, in their first year of training, accompanied with twenty-four hours of formal teacher training.

evaluate the results of this new type of school with revolutionary educational conceptions" (p. 28).

The new ESBEC and IPUEC models being promoted were seen as optimal for lifting students' promotion levels, making them more efficient, on top of the contribution to students' political formation through agricultural work. In addition, these schools were seen as a potential means of self-financing the expansion of secondary school education through the productive work carried out by students, thus resolving this critical financial problem whilst politically and practically preparing students for work. In this context, the ESBECs, and subsequent vocational specialisation through IPUECs, technological schools or institutes and other institutions, were a strong feature of the reconstruction under *perfeccionamiento*.

This evidence shows how the broad development of secondary education in this period was influenced by pragmatic responses to national conditions, as well as the broader political and economic objectives. The preparation and vocational training of specialised, disciplined, labour, in accordance with national economic demands and priorities and the optimal use of this resource in the national development plans, would emerge in this context as the dominant feature of secondary schooling. That is, secondary schooling to prepare labour, in accordance with the Soviet influenced model of economic organisation, in which hierarchical difference and specialisation were institutionalised.

Individual and state socialist vocational interests and obligations

In the section above on political objectives, I noted the recognised need to reconcile students individual vocational interests with those required by society. In this context, the First Congress on Education and Culture described ideologically and politically formed graduates as possessing a "full disposition to work in any place that their services are required" (MINED 1971b, p. 28). There was much on the economic value of education, within a broad human capital perspective, in the main speeches of the Congress, and an emphasis on the economic future of the country being dependent on school education (see MINED 1971a). In addition, the Congress saw the principle of students' vocational orientation "guiding objectives of different levels and types of

education" emerge (MINED 1971b, p. 22). In addition, JUCEPLAN was to work directly with MINED to determine the priority specialisations for the technical and vocational, post-basic secondary sub-system (MINED 1971b, p. 25).

The First Congress on Education and Culture also acknowledged the problem of high numbers of repeating students, including those with a "bad attitude towards study," determining that after basic secondary the latter would be "integrated in production centres where, after a change in attitude, they would obtain the right to continue their studies" (MINED 1971b, p. 13). This type of policy emphasises both the centrality of development objectives, justified implicitly by the articulation of these as an essential part of one's political formation and obligations. In RM 99/71 on repeating students, Castilla Más (1971) described the phenomenon as an "obstacle to the development of the country," since it impeded the required formation of thousands of "qualified workers and intermediate-level technicians that this development demands," and cost the government in terms of "the excessive use of material and human resources" (p. 24). Thus RM 99/71 limited the number of times a student could repeat subjects in a year level, and directing those excluded from school under the new guidelines either into guaranteed employment, for those over 17 years of age, or placement in a trade school or a youth work (training) brigade (Castilla Más 1971, p. 24).

This Resolution was indicative of the underlying principles being promoted in the socialist state, with respect to both work and education, as rights and obligations of citizens. Hence Castilla Más (1973b) reasserted in RM 139/72 that excessive repeaters and drop-outs from secondary school were obligated to accept work offered, with the opportunity to exercise their right to study at a later time (p. 46). The Second Congress of the UJC held in 1972 similarly declared, as a matter of principle, the moral and socialist political obligation of all graduates "to work where the Revolution places them" (UJC 1972, p. 56). In this way, a revolutionary attitude in students was defined, and to be demonstrated by students, as one that "allows no vacillation in one's incorporation into the most necessary careers, in the current conditions, that the country demands in its heroic struggle to overcome underdevelopment" (p. 51).

At the same UJC Congress Fidel stressed the urgency of "guaranteeing the formation of technicians … to meet the growing necessities that the Cuban process demands"

(cited in Castilla Más 1973a, p. 44). Castilla Más (1973a) thus continued the policy, RM 63/72 creating special vocational courses for students of working age in the basic secondary school that would give them formal technician qualifications in targeted sectors (agricultural and veterinary for men and women, with nursing, pre and primary school teaching and accounting targeted specifically for women). Sanctions were set for those not accepting the offered placements (p. 44). This tracking of students to determined priority economic sectors was further modified by Minister Fernández (1974d) in RM 211/74, which adjusted the destination of the students. The politicised conception of contributing to economic plans as part of one's political responsibilities, and the process of identifying personal interests with the broader interests of society and the Revolution, were pursued and emphasised in some cases, to the point of coercion.

The preoccupation with the economic plans and development of the country, and of making the optimal, rational use of human and material resources, clearly underlay these initiatives in secondary school education. They are similarly found in the creation of the Youth Work Army (*Ejercito Juvenil del Trabajo*), which sought to systematically use student labour, within the structure of their active military training, in economic and geographical sectors experiencing labour shortages (Dorticós Torrado 1973c, p. 78). In addition, Law 1254 from 1973 legislated students provision of three years of *Social Service* after graduating from university or the polytechnical institutes, in which graduates were obliged to spend their first three years or work in an identified priority area of the country and economy (Dorticós Torrado 1973e).

Work-study, schools in the countryside, and economic development

This process of elevating the fulfilment of economic development demands and objectives, through specific and general policies making students' work a moral and political question, can be found in the institutionalisation and promotion of the principle of work-study. As noted, the formal theory behind the policy was the critique of bourgeois education that dealt excessively with abstract theory and intellectual work, without the corresponding practice, in this way leading to a "deformed" formation in students (see García Gallo 1973; Mier Febles 1973, 1974; Fernández 1976h). By systematically incorporating productive work into the curriculum, it was asserted that students would have the opportunity to creatively apply the knowledge acquired in the

classroom in a meaningful way, and through this practice learn to value manual work, appreciate its social worth, and receive a full communist formation. In terms of economic objectives, work-study and the schools in the countryside sought to provide a better work preparation for students, by developing work habits and attitudes towards work, and make a potential economic contribution to the state through the productive work carried out by students.

Thus RM 55/72 formalised the policy of work-study for students in the 'technical and vocational' sub-system of secondary school education, on the basis that this would help to "increase productivity and link each students to a position in the workplace" (Castilla Más 1972a, p. 40). Additionally, Castilla Más (1972a) advised that the agricultural specialisations of Technical Education would be converted, through the work-study principle, into "authentic units of production" (p. 40). Hence while the rhetoric in the preamble of RM 55/72 asserted that work-study was a fundamental principle of the national system on the basis of its political aspect, regardless of any economic benefits, the whole Resolution was firmly focused on these immediate and longer term benefits. Economic development objectives appeared, at the very least, to be a major influence on the formulation of such policies. This influence was most apparent in the ESBECs, in which the work component was increasingly presented in economic terms, while the political or ideological benefits were expressed as promoting individual habits of discipline, punctuality, and other attitudes and values contributing to more productive future workers.

First and foremost, the ESBEC (and IPUEC) model developed in the late 1960s potentially offered a solution to the problem of financing the massive expansion of secondary education required in the 1970s. At the same time, the schools could contribute to students' political formation, vocational orientation and general work preparation. On this basis, their massive expansion as the universal model of basic secondary schooling was pursued. In 1971 Fidel (1971b) made this clear, observing that the expansion of education to date had been "above our real economic possibilities" (p. 5). Noting the impending difficulties in meeting the needs of the expanded number of primary school graduates, Fidel added that the economic output of what was envisaged to be hundreds of thousands of secondary students, engaged primarily in

agricultural production for three hours a day, provided a model of self-financing that would allow for the unlimited construction of the new schools (p. 7).

The central dilemma for Cuba, and other underdeveloped countries, was outlined by a MINED delegation to a conference in Venezuela. They noted the urgent need for trained technicians and professionals, and hence for universalised education, as a prerequisite for development, and the economic constraints linked to underdevelopment that restricted the country's ability to provide this education (Delegación de Cuba 1972b).[96] Thus work-study, and the close alignment of education with the needs of the national economy, was presented as the best model for universal education and economic development in underdeveloped countries (Delegación de Cuba 1972b, p. 24). Fidel (1971b) also noted the support "for the economy … [and] … for the development of the country" (p. 7) that work-study in the ESBECs promised, both through their facilitating the educational expansion and potential direct contribution to the economy.

Critically, the approach being expressed was based in the assumption that "the advance of the country will be determined by the success that we have in education" (Castro 1971b, p. 6). Expansion and development of school (vocational and academic) education was, however, firmly entrenched in government policy and thinking as an essential aspect of economic development planning to overcome underdevelopment. Describing the opening of a new ESBEC, Sánchez Lalebret (1971) presented the whole concept as the first step in overcoming deficits in the labour force (pp. 54-55). The Cuban submission to UNESCO in 1974 went further, asserting that "It is clearly not only a vital educational principle that students should produce goods; it is also necessary to development" (Figueroa, Prieto, and Guitérrez 1974, p. 17).

These ideas were formalised in RM 143/72 in which Castilla Más (1973c) observed that the ESBEC was one of the key elements in the "integral formation of our youth, through their connection with the development of the country" (p. 1). Further, the

[96] Texts like these, published in the name of an official delegation to an international conference, are referenced under this published name of 'Delegación de Cuba'.

location of the schools in agricultural sites ensured students' integration into "the country's programs for social and economic development, with the consequent support for the nation's economy" (p. 1). The following year, Minister Fernández (1973c) called for tight regulation and control of the three hours of productive work to achieve better productivity (p. 73). In line with the general political shift towards the creating the material and economic basis of socialism, Fidel was cited in *Bohemia* asserting that "the edification of the new society is based in work … on this premise emerges the need to develop the objectives and proposals of the Revolution" [in \Editor, 1972 #311, p. 47]. Mier Febles (1973) presented work-study as within the Marxist-Leninist conception of polytechnical education, the latter being necessary due to the social laws of changing work, the incorporation of technology in production, and the law of increasing knowledge required by workers (pp. 46-47).

The evidence clearly shows that this important educational policy, which effectively reshaped secondary school education, was based fundamentally in the perceived economic benefits, both immediate and longer term, of directly involving students in productive work. Beyond resolving the immediate problem of the expansion of secondary schooling, the policy was consistently presented as the optimal method of producing "the qualified work force quantitatively and qualitatively required by the country" (Figueroa Araujo 1975, p. 19). With reference to the future planning of secondary education towards the 1980s, Figueroa Araujo (1975) foreshadowed pre-vocational schools in the country for 13-16 year old repeating students; more ESBECs, IPUECs, technological institutes and elite IPVCEs; and polytechnical centres attached to sugar mills (p. 38). The new schools were intended to assist in students vocational orientation, and impart good work habits to all students, through the experience of productive work and a general commitment to contributing to the social and economic development of the country. These intended outcomes support the general argument that secondary school education expanded, and was perceived, primarily as a means of creating the labour or human resources required to achieve the socialist development program.

The envisaged self-financing of secondary schooling through the ESBECs was not achieved, and indeed later in the decade the high cost of the schools saw the push to

universalise the model reconsidered (see Castro 1977). Assessing the extent to which the perceived indirect, longer term economic benefits of the vocational push and preparation through work-study were realised, is much more problematic, and beyond the limits of this study. Claims of such positive outcomes have been made, however, generally highlighting the consistently high levels of resources given to education and the corresponding economic developments. Rodríguez García (1990) for example, includes a "significant volume of resources" assigned to education, particularly designed to raise generally the qualifications of workers, as part of the broader investment in the infrastructure for development that would be "recoverable in the long term" (p. 145). The human capital thinking is most clear in his conclusion that, in 1975, the ongoing lack of qualified cadre continued to "limit" or constrain "economic development" (p. 145).

Other positive appraisals of the economic benefit of this investment in human capital include Mesa-Lago's (1978) identification of the "training of technical personnel" (p. 35) as one of three concrete measures in the economic restructuring of 1971-75. Broadly in line with Fitzgerald's (1990) thesis on the shift from political credentials to technical expertise in this period, driven by economic development objectives, Mesa-Lago (1978) cites Carlos Rafael Rodríguez's 1972 criticism of "the substitution of political cadres for technocrats" (p. 36). Similarly, Zimbalist and Eckstein (1987) assert that "Payoffs from previous investment and a better educated labor force undoubtedly contributed to the impressive economic performance of the early 1970s" (p. 13).

These secondary appraisals serve to confirm the extent to which economic development benefits were perceived in Cuba, and elsewhere, as arising out of the expansion and development of secondary schooling. Regardless of any actual economic benefit, the literature and policy reforms, particularly in the case of the schools in the countryside, were clearly influenced by these perceived benefits. Formal secondary schooling thus emerges as being conditioned or shaped, in formal policy, by concepts of labour or human capital formation and future returns for the national economy.

Preparation for work and technical-vocational specialisation

At the inauguration of an ESBEC in 1971 Fidel noted that "it is logical that work, formation for work, the concept of work and preparation for work form an essential part of education" (Castro 1971a, p. 13). Hence, Fidel went on to observe that in these new schools, students were expected to "acquire the habits of work as the most natural and fundamental obligation of all citizens, together with the habits of study" (Castro 1971a, p. 13). Given that the majority of students in the ESBECs would ultimately work in a non-agricultural vocation, the preparation for work envisaged involved general qualities like students attitudes towards work, or personal habits like discipline and punctuality. Such outcomes were implied in Fidel's advice to new students of the ESBECs: "if something is to be condemned it is the lack of discipline, lack of willpower, and lack of consistency in the spirit of sacrifice" (Castro 1971a, p. 22).

A more direct preparation for work was expressed in RM 95/73 on the development requirements of the country, in which Fernández (1973e) articulated the official position that viewed the "rational utilisation of our human and material resources, as an indispensable element to increase productivity, raise production, and improve quality" (p. 75). On this basis, mature (working) age students in year 8 level were directed to targeted vocational training, to become 'qualified workers' or 'intermediate-level technicians' in the most urgent sectors of the economy (p. 76).

The most contradictory measure instituted in this period, and subsequently extended, was the creation and official promotion of the elite Vocational Preuniversity Institutes of the Exact Sciences (IPVCEs – *Instituto Preuniversitario Vocacional de Ciencias Exactas*).[97] Inaugurating the best known of these, the *Lenin*, with Brezhnev in 1974, Fidel proudly proclaimed that entry into the school rested on a "rigorous selection of students, based in their high results achieved in primary school and their accumulated school records" (Castro 1974, p. 5). The contradiction of a selective and elite sub-

[97] Initially, IPVCE's like 'The Lenin' enrolled students directly from primary school, and hence provided a selective, basic secondary and preuniversity level of schooling. As is noted below, after 1984 they only enrolled students in the upper secondary (preuniversity) level.

system was not directly addressed by Fidel, but the rationale for their creation was made clear. The economic development required by the socialist project, resting on the scientific and technical advances, in turn required elite and specially trained personnel to apply these advances. The creation of a new elite within the upper secondary level, added the division already created by the academic (preuniversity) and technical post-basic secondary split. It was justified in similar terms, on the basis of the need to optimally use and train human resources in this way, in order to maximise development (see Fernández 1976b; Castro 1974).

This reform highlights the contradictory nature of the process of pursuing communist political and economic development objectives, and the extent to which the new socialist politics of the 1970s justified the hierarchical differentiation of workers, and students. In addition, the policy of providing superior secondary educational facilities for a select group of students in revolutionary Cuba is further evidence of world-systems economic and geocultural influences over school education. With specialisation and differentiation being vigorously promoted as a strategy for efficiency in the economy, alongside world-systems conceptions of school education to support the economy (see below), the context was set for this contradictory policy to be implemented.

As the previous chapters have shown, specialised training for work, within secondary school education, was not new to this period. Indeed, Kolésnikov (1983) for example notes that by 1970 the Ministry of Sugar operated some sixty seven polytechnical schools, "annexed to sugar mills," that trained personnel specifically for this industry (p. 123). Under the Soviet influence, and subsequent restructuring of the national system under the *perfeccionamiento* process, the differential, specialised training of students in polytechnical schools and institutes was more systematically institutionalised, with more detailed planning of the specific labour requirements of national economic plans. Thus, for example, three branches of the Vice-Ministry of Technical and Vocational Education were created in 1971, dealing with industrial education; agriculture; and economics and administration (Kolésnikov 1983, pp. 134-35). The influence of the Soviet Union on this process is openly asserted by Kolésnikov (1983), who notes that Soviet advice and technical assistance in the 1970s saw Cuba

establish "the polytechnical schools for the preparation of qualified workers and the polytechnical institutes for the preparation of intermediate-level technicians" (p. 147). Between 1970 and 1975, ninety two technical schools and institutes were built in Cuba (p. 147).

This shift in policy brought more specialised vocational training into the mainstream, national system of secondary school education. The increased emphasis on vocational education is evident in the increased spending on this sub-system since 1970. Epstein (1988) for example, citing UNESCO data for 1983, notes that "the number of … [secondary] … vocational students has multiplied over six times since 1970," with the number of teachers for the subsystem being four times that of 1970 (p. 268). A significant increase in enrolments in secondary vocational training, greater than the corresponding general increase in secondary education as a whole, had begun in this period. The policy already in place was thus extended, as part of the emphasis on school education as preparation for work. The profile of the whole concept of this level of formal education being directed to the preparation and training of labour was necessarily raised as a result. The differentiation implicitly supported, and articulated with, the policy shifts in economic organisation, such that secondary school education was responding directly to the specific economic requirements of the national political economy. This characteristic came to dominate later in the decade and into the 1980s.

Given this underlying thinking, and the national socioeconomic climate, it is not surprising that the process of *perfeccionamiento* reinforced the general economic development and work preparation perspective within the main sub-system of general education. As noted above, one side of MINED's "mission" expressed in RM 210/75 was to "contribute to the development of the economic and social plans of the country" (Fernández 1975a, p. 104). The reformed curriculum elaborated for general secondary education thus strongly emphasised Spanish, Mathematics and the Sciences, reflecting the Soviet and world-systems inspired faith in science and technology as vehicles for planned economic development and progress. Thus in basic secondary school the sciences (geography, biology, physics and chemistry) accounted for 26.2% of total classroom hours, followed by Mathematics at 17.8% and Spanish (language and literature) with 16.6%. At the preuniversity level these percentages were 33.3%, 16.6%

and 10.7% respectively. In addition, basic secondary included the subject of labour education that took up a further 7.1% of classroom hours, as did the subject 'bases of contemporary production' in the preuniversity level (calculated from data in MINED 1975c, Anexo 1, p. 26).

Within formal policy, the perceived human capital return on education, and the objective of socialising students into becoming efficient and productive workers, were regularly expressed. In RM 325/75, for example, Fernández (1975d) noted that within the guidelines of *perfeccionamiento* students had to learn in school that one of their principal social obligations was "to study and prepare for their future incorporation in the construction of socialism, as technical cadre working for the economic development of the country" (p. 121). Such statements leave no doubt as to the intended outcome of the secondary school process. Ministerial Resolution 705/75 created a Commission to organise the same type of thorough review and *perfeccionamiento* for the sub-system of technical and vocational education, based primarily on the foundation of "the demand for a qualified work force," and need for even greater precision in the training of students in particular specialisations, in response to the demands of economic development (Fernández 1975e, pp. 121-22).

In another description of the *perfeccionamiento* process, the Ministry of Education explained that the restructuring was primarily driven by the need to readjust the system to better "adapt the school to the requirements of development" (MINED 1975b, p. 23). Prado García (1975b) similarly reiterated that *perfeccionamiento* was necessary to overcome the inadequate linkage between science, technology, the demands of the economy, and education (p. 7). Leaving no doubt as to the official position, Prado García (1975b) asserted that whereas the economy had been relatively indifferent to general levels of education in the past, the scientific and technological revolution meant that:

> today, immediately following science, general education has been converted into one of the most important forces that determine the possibilities of the further development of the economy … [and] … of the society (p. 10).

The reformed general secondary education, he explained, was aimed at providing each student with the minimum knowledge required for their practical use in life, and to initiate their entry into the workforce (p. 11).

The whole *perfeccionamiento* process thus involved a perceived economic benefit through a general raising of students basic education and cultural levels, upon which they could be better trained and prepared for specific vocations and occupations. Additionally, the general or common education received, particularly in the ESBECs, was seen as leading to the formation of disciplined habits and desired attitudes towards work, in whatever field that turned out to be. Further, students were to internalise a sense of moral and social obligation, to work productively in their vocation, which in turn was to be by their personal preferences and the needs of the society and economy. These values and attitudes were similarly intended to be carried into the particular type of training, and subsequent vocations, that followed basic secondary schooling. Within this climate, the intended political objectives clearly centred on students belief in and commitment to the government's plans for social and economic development, and an acceptance of their rights and obligations regarding work and study in the socialist state.

Finally, the First Congress of the PCC articulated the approach underlying the development of secondary school education, and publicly driving its *perfeccionamiento*. Citing the accords on education made at the Congress, Fernández, (1976h) would describe one of the basic principles of school education as "the correspondence between the planning for the national system of education and that for the social and economic development of the country" (p. 5). Once again, this was endorsed to prepare "technical cadre .. with the best professional qualifications" (p. 6) needed to make the necessary economic contribution. In his central report to the Party Congress, articulating the critique of the 1960s and subsequent shift in policy being implemented, Fidel explicitly described secondary and tertiary education as being directed to achieving:

> the required number of duly qualified intermediate level technical workers, specialized university-trained teachers and cadres, capable of fully enjoying their general welfare and responding to the country's need for economic and social development in the coming years of the present and future centuries (Castro 1975b, p. 144).

The evidence leaves little doubt that economic development objectives, linked to the Soviet and world-systems geocultural influences on revolutionary Cuba, were the fundamental or characteristic features of secondary school education policy in this time.

SECONDARY SCHOOL DEVELOPMENT AND REFORM IN THE WORLD-SYSTEM

The analysis has emphasised the influence of economic development objectives, evident in concepts of secondary school education directly and indirectly contributing to students' general preparation for work, and hence to future productivity and economic expansion. The impact of this underlying perception of schooling has also been identified within the political objectives, such that the communist formation of students came to involve developing values and attitudes related to work. These responses reflect the influence of the national political economy over schooling, educational policy and development, heightened at this time by the economic crisis of 1970 and the related economic and political alignment with the Soviet Union and socialist bloc. World-systems influences on the national context, and more directly on models and approaches to secondary school education, have emerged in this analysis. A more detailed account of these that is made, to conclude the analysis for the 1970-76 period.

The analysis contributes to an understanding of why this process, ostensibly intended to constitute a radical, revolutionary break with the old model of bourgeois education (see for example the preface in Figueroa, Prieto, and Guitérrez 1974), came to rely on conventional school structures, practices, and perceptions of its social and economic functions in society. That is, the national program of socialist economic development to overcome underdevelopment and help modernise and industrialise the country, reinforced and shaped the objectives for school education within this context. The national conditions and influences, however, were themselves conditioned by the broader world-system, and it is in these that the fundamental, constraining influences on the educational project in Cuba are found.

This section deals with the world-systems geocultural influence on several levels. First, via the national economic development project, as the revolutionary government attempted to overcome the country's inherited underdeveloped past and improve the

relative economic and social position of the island within the world-system. At this level alone, the world-system impacted on school education through the priority given to national development. Similarly the related world-systems concept of possible development for the sovereign state, and the belief that rationally applied science and technology could bring this progress and development, added to this influence. More directly, national thinking about the functions and structures of school education, as a means of creating loyal citizens of the sovereign state, loyal to its institutions and system of governance and identifying with the national interest, reflects the world-systems geocultural influence. This was apparent in the inclusion of work and education as rights and obligations of the new citizens, linking this citizenship formation to the development project. Finally, the world-systems geocultural influence explains the dominance of the economic development objectives on specific secondary school policies, structures and practices, similarly based in the goal of national development.

The capitalist world-economy influence

A conditioning influence of the capitalist world-economy over the development and reform of secondary school education in Cuba can be inferred, on a broad level, from the general emphasis on school education as a contribution to the immediate and future economic development of the country. Just as the question of overcoming the nation's underdevelopment had been at the core of the failed ten million ton sugar harvest, intended to provide a massive injection of funds with which to finance new industrial projects and transform the national economy, so to was it found within the socioeconomic and political reforms of the early 1970s. The hoped for rapid transformation of the economy had not taken place, but remained on the agenda as a crucial aspect of revolutionary socialist policy.

The shifts in national economic policy in the period add support to the argument that the capitalist world-economy continued to influence or shape these shifts. Carlos Rafael Rodríguez affirmed in a 1972 interview that despite the continued emphasis and reliance on sugar production, and the extended trade links with the Soviet Union, the national project of economic diversification and industrialisation remained in place, but had been "postponed" in the short term while agricultural production was the basis to fund this future development (in Harnecker 1972, p. 149). He thus noted the pragmatic nature of

the shift to Soviet economic alignment, observing in reference to Cuba's full entry into the CMEA that "the fundamental idea is that without integration there is no development" (in Harnecker 1972, p. 156).

Writing for the journal *Economía y Desarrollo*, Rafael Rodríguez (1972a) further elaborated that the economic links with the Soviet Union were aimed at "the conversion of Cuba into a developed, agro-industrial country … and later into an industrialised country" (p. 159). As in the previous decade, sugar remained the most readily available hard currency earning export commodity, and the modernisation and mechanisation of the industry was seen under Soviet integration as the long-term means of financing development. Thus these comments of Rafael Rodríguez were addressed primarily to the question of the Soviet and CMEA economic integration and the ongoing role of the sugar industry in the national economy. They are, however, indicative of the ongoing influence of the world-economy constraining the national development efforts, and its strategies and policies. This highlights one of the broad ways in which the world-systems influence conditioned the underlying basis of the school education project, by constraining and maintaining the emphasis on national economic development.

In the capitalist world-economy Cuba's foreign trade had come historically to depend on a single commodity, linked to former colonial rule and dependent capitalist development. Ongoing trade within the capitalist world-economy continued to strengthen the strategy of financing future industrialisation and national development through the export of sugar. Whilst the revolutionary government clearly pursued a more active and serious effort to achieve the development goals, aimed at ultimately breaking the dependence on primary commodity exports and the associated effects of unequal exchange, the socialist economic strategy pursued in the 1970s continued to be conditioned by the capitalist world-economy. More stable prices for foreign trade, particularly sugar, and improved terms for foreign debt, were achieved with the Soviet Union and CMEA in this period. World market prices, however, continued to influence such agreements, supporting arguments that the socialist trading system and division of labour operated within the capitalist world-system (see Wallerstein 1995a; 1984; 1983a; 1979; Chase-Dunn 1982b; Eckstein 1982).

The direct influence of the Soviet Union and its methods of economic planning and organisation also promoted the return of work norms in Cuba, as a means of measuring and increasing labour productivity (see Rodríguez García 1990, p. 134). Accompanying rhetoric like that of Fela Gutierrez (1972), proclaimed the great 'discovery' of productivity, as the key to increasing production, consumption, and the general standard of living, and that this would result from the "Plan for the Organisation and Control of Work" (p. 20). That is, the establishment of work norms and the efficient use of "all the resources at our disposal: science, technology and the best methods of organising and controlling production" (p. 20). Here too the socialist project, as suggested by Wallerstein (1995a), implicitly "accepted the world-scale liberal agenda of self-determination … and economic development" (p. 109), articulating the socialist variant as the superior model for achieving and maximising efficiency and productivity, and the use of science and technology, to increase living standards under national economic development.

With respect to education, the broad connection at this level can be seen in the world-systems influence on national economic priorities and strategies like those described above, and for example statements by the Education Minister describing school education as an integral part of the rational use of human resources leading to improved production and productivity (Fernández 1973e, pp. 75-76). Achieving social and economic development had become a principal feature of the revolutionary project, in the context of underdevelopment within the capitalist world economy. Applying school education to these objectives was strengthened in the early 1970s, as their inadequate, systematic application to this task was implicitly criticised as contributing to the economic problems of the 1960s. The geocultural aspects of the world-system more directly reinforced this interpretation of the roles of school education, as an investment in future development and the creation of loyal citizen members of the socialist state.

The world-systems geoculture conditioning influence

Direct connections between Cuban economic strategies for development and school education, like the dependence on sugar production and moves to establish polytechnical schools attached to Sugar Mills (see Figueroa Araujo 1975), can be identified as part of the broader influence, based in the concrete economic constraints

facing the island. That is, the need for hard currency to pay for imports and service foreign debt, and the impact of world commodity prices and negative effect of unequal exchange. These added legitimacy to the expansion of education based on its ability to contribute to national economic development, and socialise the youth as active participants in the socialist development project.

The world-system level influence was also felt in the national context through shared ideas and basic premises and objectives of Cuba and other parts of the world, as part of the geoculture of development. That is, the underlying world-systems consensus between socialist and capitalist states, with respect to national development for the sovereign state, rational progress based on scientific and technological advances, and more specifically the roles, functions, structures and practices of school education in the process of development within the modern state. This consensus is found in the main objectives identified for the Cuban schools – economic development and (socialist) citizen formation – and in the specific structures and policies to pursue these.

The previous chapter noted William Connell's (1980) account of the widespread, international practice in the 1960s of "planning educational development to meet the needs of future manpower (sic) requirements forecast by economic planners as necessary to attain some economic target" (p. 413). Bacchus (1997) has similarly argued that "Most educators consider a positive linear relationship between education and economic development to be axiomatic," citing India's "Kothari Commission" report in 1966, and World Bank norms on the economic return on investments in education, despite evidence to the contrary (p. 19). The focus is not whether school education actually provides the economic return, but the belief in its potential to do so across the world-system. This belief, as part of the geoculture of development, with formal, basic and specialised school education seen as a prerequisite for economic development, are consistent in the Cuban policies and statements described above. Bacchus's (1997) describes the world wide premise as viewing:

> more education increasing qualitatively the stock of human capital, raising the level of cognitive skills of the workforce, and thereby increasing productivity and improving the rate of economic growth (p. 19).

While the language may differ slightly from the Cuban emphasis on preparation for life and work, or the specific acquisition of communist work habits and attitudes, the underlying premise emerges strongly in revolutionary Cuba in the early 1970s.

Robert Cowen's (1983) *International Yearbook of Education* prepared for UNESCO further contributes to the world-systems geocultural view, by reference to the "development problem and … associated educational phenomena" for the Third World and industrialised or developed countries (p. 132). The report describes the tendency in underdeveloped countries to try and "remove gross inequalities in educational provision … while allocating sufficient resources to secondary-level vocational and technical education, short-cycle higher education, and university education to meet development 'needs'" (pp. 132-33). Additionally, the report notes that both underdeveloped and developed countries define development needs as the "sorting and selection of people by the education system; perceiving education as State investment; and education as human resource development" (p. 133). The identification of the characteristic features and goals of Cuba's secondary schools forthis period, and particularly the contradictory policy of selection and providing differential training for upper secondary students is consistent with this world-system level description of school education and its relationship with the economic 'development problem' confronting nation-states.

The Cuban model developed in this period under *perfeccionamiento*, and implemented from 1975, also showed signs of the world-systems geocultural influence in its conventional structures of schooling. That is, a model of basic academic, vocational and cultural training for all students, in structured, universal classes of students of similar age, across standard subject disciplines, in which the content knowledge for the basic level of training was imparted by specialist teachers. Cuba's schools in the countryside broke Boli and Ramirez's (1986) "institutional rules" (p. 79) to some extent, though the productive work component was just that: an additional component of conventional academic and vocational preparation in regular classes. Further, the new secondary schools, whether ESBECs, IPUECs, the selective IPVCEs, technical schools and institutes, or regular basic secondary and preuniversity schools in urban areas, all operated under the geocultural notion of their being a right and

obligation of citizens, helping to create skilled and loyal citizens ready to make their contribution to the state.

The emphases in Cuba on vocational and polytechnical education, and as expressed by Cowen's (1983) review "the inculcation of patterns of human behaviour which support strategies determined for national development" (p. 135), were strengthened in the 1970-76 period. The combination of this repeated stress of linking school education to development, and the definition of the intended political formation of students in terms of skills, values and attitudes for the interests of the nation, strongly supports the argument that policy formulation and reconstruction in Cuba was conditioned by the world-systems geocultural influence.

In this period there was a decisive political, institutional and socioeconomic shift towards, and in many ways formal alignment with, the Soviet Union. Through this alignment, the Soviet Union had a direct influence on the approach to secondary schooling in Cuba, and the reformed model that ensued. Thus, for example, the standardised model under *perfeccionamiento* of three years basic secondary, followed by two or three years of specialised training in an academic (preuniversity) or vocational (technical schools and institutes, teacher training etc) track, closely followed the Soviet model and recommendations for secondary schooling [for for details on the Soviet model and thinking behind it, brought to Cuba in 1972, see Centro de Desarrollo Educativo, 1972 #309]. Indeed, the whole Soviet emphasis on secondary schooling as, above all else, a process of preparing qualified labour, underlay the Cuban reforms (see Kolésnikov 1983). The direct influence of the Soviet Union reinforced and extended existing trends in the Cuban system, adding more formalised and systematic structures for selecting and differentiating between students in secondary schooling. In this direct influence the Soviet specialists reinforced the world-systems geocultural influence, as shown by the content of the reforms.

A number of significant articles from Soviet specialists appeared in the Cuban journal *Educación* in these years, implicitly illustrating the support for the expressed Soviet model that made its way into the general reform process. Bogdon Suchodolski (1971a), for example, acknowledged the convergence between developing and industrialised countries, with respect to the universal expansion of mass education being

rooted in "the objective necessities of the national economy and culture, that demands a continuous increase in the number of qualified personnel" (p. 37). He goes on to assert that school education, "above all else, is a factor for the reproduction of the work force, a vital investment for national scientific and economic development, very important for our struggle" (p. 41). With respect to the potential contradiction between economic needs and social aspirations in education, Suchodolski (1971b) argues that:

> the satisfaction of the social needs of education must be linked to national economic progress and modernisation, because these principal processes create the conditions and means by which to guarantee individual aspirations (p. 53).

Expression like these fully capture the world-systems geocultural influence on Cuba's secondary schools being advanced. That is, human capital understandings of school education, shared by underdeveloped and developed, socialist and capitalist states, in which the individual and social needs were identified with the national development plans for the state.

One of the most significant publications with respect to the Soviet influence was the 1972 Ministry of Education report entitled *Conferencias Sobre Pedagogía Socialista* (Conferences on Socialist Pedagogy), based on a three week visit of Soviet specialists with a focus on "general education and the preparation of students for production activities" (MINED 1972b, p. 7). The document described the Soviet model in detail, emphasising school education's preparation for work through a system of a common curriculum for all students, with success based on promotion, and specialisation through "horizontal differentiation," including vocational training and elite selective schools at the post-compulsory level (pp. 17-47). The Soviet model presented effectively describes the reformed Cuban model put into place under *perfeccionamiento* in 1975.

Similar expressions about the role of secondary schooling from the Soviet Union, reflecting the world-systems geoculture of development and its conditioning influence on school education, continued. For example, Mijailovich Volkov (1976) again highlighted the Soviet faith in the economic potential of public education, claiming that in recent times "the role of education as a decisive factor of production has increased considerably" (p. 84). Further demonstrating the type of catch-up style approach of this

influence, he asserted that in more developed countries approximately half of net increases in GDP were attributable to their increased numbers of trained personnel (pp. 84-5). While Mijailovich Volkov (1976) acknowledged a lack of precision in determining the economic efficiency of, and actual financial return on, educational investments, the basic premise was unquestioned. Within the world-systems geoculture of development there was an "organic cohesion" between education and the economy (p. 89), linked also to the specific division of labour and specialisation within socialist countries under the structure of the CMEA (p. 91).

CONCLUSION

The development and reform of secondary school education in the 1970-76 period was consistently presented, in the formal policy documents and analyses from within Cuba, in terms of national revolutionary goals and objectives, both specific to education and linked to the broader socioeconomic project. National policies and subsequent models and practices thus appear to have been made in response to specific national conditions, and the national political approaches within these conditions. The national conditions of revolutionary Cuba, however, clearly produced policy responses for secondary schooling based in world-system level approaches to universal, state provided school education.

The explanation of these developments needs to move beyond national phenomenon, to understand the transnational or world-system level context in which they took place. That is, the capitalist world-system that historically conditioned the national socioeconomic context, and conditioned or shaped the cultural and institutional responses within this, through the inherited underdevelopment of the country and the geoculture of development common to all nation-states of the world-system. The economic and geocultural influence of the capitalist world-system thus provides the broad, overarching framework within which the state of Cuba developed, was legitimated, and pursued its program of national development that included the mass expansion of school education. In the early 1970s, under this framework, world-systems concepts of secondary school education to socialise members of the socialist state, with skills and attitudes required to contribute to its economic and social development, via

formal schools and classrooms and specialist knowledge, were entrenched. These influences, largely unquestioned, underlay or constituted the "limiting parameters" (Dale 1994, p. 22) of the particular types of schools and their organisation established in Cuba.

Particular national approaches were not excluded under the world-systems geocultural influence. Cowen's (1983) UNESCO report notes, in this light, that the perceived role of school education in "national mobilization around the economic development problem, [is] construed in particular and different cultural terms" (p. 135) according to the national setting. The authors also suggest that in 'developing' or 'Third-World' countries, this emphasis on education as an investment in development often leads to the exclusion of some sections of the population from significant amounts of education, and conversely the "over-education" of others (p. 133). Clearly under the 'cultural terms' of socialist Cuba this was not the case, with the emphasis on education for development was also connected with the practical expansion of education for all citizens.[98] Universal education remained, however, tied to the economic development and citizenship goals.

This broad or limiting, conditioning influence in seen in the model of secondary schooling put forward under *perfeccionamiento*, and the general and consistent emphasis on school education's contribution to economic development, and the production of a citizenry committed to the socialist development project. Thus for example, the formal incorporation of political subjects under *perfeccionamiento* was presented by the Ministry as a means of instilling in students the importance of the socialist state, and the PCC, in the historic task of building the socialist society. This necessarily involved a disciplined approach by students to their rights and obligations in the new society, and the plans and strategies for economic development that were central to it (MINED 1976, p. 17).

[98] This political commitment also linked historically within Cuba to the work of the national martyr, Jose Martí on education and the much cited idea: "to be educated is to be free" (see for example Fernández 1986c, p. 35).

Similarly, the propaganda campaign announced by the Ministry to promote knowledge of the Socialist Constitution, can be seen as part of the attempt to socialist active and loyal members of the socialist state. The Ministry called on teachers to instil in students the Constitution's key historical antecedents, the need for the new constitution and its status in the socialist state, and above all the peasant-worker alliance formalised in the document, "guided by the working class and its organised vanguard, the Communist Party of Cuba, the highest directing force of the state and Society" (Fernández 1976e, p. 116). It also emerged that at this level, as in the economic restructuring, students were to acknowledge and accept, as new citizens of the socialist state, a level of differentiation in which a vanguard or technical elite were selected to lead or manage economic and political affairs. In the same way, this world-systems influence on efficiency through hierarchical specialisation justified the divisions and specialisation in post-basic secondary school education.

The development and reform of secondary school education in Cuba, in the 1970-76 period, and the world-systems influence linking its structures and practices to economic development goals, further entrenched this educational division. The broad concern with catch up style national economic development translated in the political context of Cuba as a concern for increased productivity and efficiency in production. Trends in this period, along the lines of the Soviet model, brought increased socioeconomic inequality through the 'socialist principle' of differential remuneration according to work, indicative of the world-systems influence on thinking for economic efficiency. In this context, cultural inequality, through differential secondary school educational training and qualifications was endorsed, in turn justifying the related socioeconomic inequality. School education was to produce effective workers, by promoting the required habits and dispositions for disciplined and productive work, with specialised skills and vocational training, matched with differential rewards, to further motivate the required work.

The world-systems geocultural influence did not directly prescribe all aspects of secondary school education as they developed in Cuba in this period. It did, however, provide the main educational ideas or ideology, that included the accompanying basic model of the institution which interacted with the national conditions. The timing of the

major restructure of general education, immediately following a serious social and economic (and potentially political) crisis and in the midst of a governmental response to the crisis characterised as 'institutionalisation,' was almost certainly a specific, national factor behind the reform of this period. Under this perspective, specific local conditions contributed to the timing of the reform, the content of which in turn was conditioned by the world-systems geocultural framework within the national conditions.

It is this characteristic of the reform of secondary school education in 1970-76 that I have emphasised in this chapter. That is, the content of the formal policies and reform, the national context in which these were formulated and articulated, the major objectives on which they were based, and the way in which a world-systems geocultural approach can account for and explain the subsequent model of secondary schooling that emerged. The world-systems influence in the 1970s consolidated existing trends in secondary schooling, with the direct influence of the Soviet Union extending, in particular, the structures and procedures for selective and specialised training at this level. This was based on the dominant objective of national economic development and the intended role of secondary schooling in its achievement . Secondary schools in the revolutionary Cuba of the early 1970s then, increasingly responded directly to the perceived needs of national economic development planning, as conditioned by the world-systems geoculture of development. The time-line for the implementation of the restructured model began with the 1975-76 school year, and it is to this implementation of the reformed system in the second half of the 1970s, and its development into the 1980s that I now turn.

Chapter IV:

Secondary school expansion, 1976-1985: The selection and training of skilled labour

Discipline is not just another aspect of educational work, but the result of its efficiency. Work to achieve the conscious discipline of students, so that good behaviour and good conduct will be an expression of the principles and convictions of communist morals.

- Fidel Castro, July 7, 1981.

INTRODUCTION:

The 1976-1985 period brought mixed results for the Cuban Revolution, and continuity in secondary school education. The economic recovery that began in the first half of the 1970s moved into recession by the end of the decade, as the national economy continued to feel the impact of world commodity prices and a growing hard currency foreign debt. Domestic economic austerity associated with the recession contributed to a political crisis in 1980, when approximately 125 000 Cuban citizens left the country for the United States.[99] The early 1980s, however, saw the increased consumption of the late 1970s return and grow, alongside heightened economic integration with the Soviet Union and the CMEA. Like the previous quinquennium, the early 1980s brought generalised, though uneven, industrialisation, expanded consumption, and economic growth.

The new System of Economic Management and Planning (SDPE) foreshadowed in the First Congress of the Communist Party was progressively implemented from 1976-77, with constant modification and reform. As part of the general post-1970 emphasis on economic efficiency and productivity, the SDPE extended the market style reforms, with a combination of 'centralised decentralisation' (see Zimbalist 1985; Pérez-Stable

[99] This migration is often referred to as the 'Mariel exodus' or 'Mariel boatlift,' in reference to the Cuban port of Mariel which was the main point of departure for the exiles.

1993a). The new system brought limited self-employment, private agricultural production sold on free markets, and the private construction and sale of housing. This combined with varying levels of decentralisation for state enterprises in terms of budgeting, reinvestment of profits and labour relations. As stressed in the previous chapter, this was carried out under the framework of the re-emphasised 'socialist principle,' entrenching differential labour and wage structures. This in turn strengthened the creation of occupational and social hierarchies, through notions of technical expertise, and efficiency through specialisation, differentiation, and work discipline.

By 1985 the government again confronted domestic economic problems, linked to Cuba's terms of foreign trade and a large, hard currency foreign debt. Potential political problems also returned in the face a domestic austerity strategy in response to these problems, and increased levels of inequality as a result of the decade's economic reforms. By 1985-86 official critique and reform of the SDPE and other institutions and practices of the 1970s and 1980s were building, leading to a renewed emphasis on politics and ideology under the banner of 'The Rectification of Errors and Negative Tendencies'.

Looking at the whole 1976-1985 period, the characteristic context of uneven economic performance, and periodic sociopolitical problems, continued. In macro terms, however, the period brought significant economic expansion to the island. The relative abundance of consumer goods in the late 1970s and early 1980s, through state rations, state run parallel markets and trade fairs, and limited free market outlets, made it part of what is now referred to in Cuba as the "economic bonanza of the 80s" (Perera Robbio 1998, April 4, p. 4). In addition, the political institutions of *poder popular* were extended and entrenched throughout the country, membership of the PCC and UJC grew, and high levels of employment were maintained. In this general context, and clearly conditioned by the Mariel exodus, the period further entrenched the legitimacy of the government and its new institutions, following the upheaval of the late 1960s (see Pérez-Stable 1993a; 1993b).

The context of the national political economy, linked to the post-1970 Soviet influence on the process of institutionalisation and economic organisation, also extended the tendency of specialised, hierarchical school educational organisation. The

expressed commitments to efficiency and productivity, shaped by the world-systems influence, effectively viewed labour as one of many costs of production, to be managed in the attempt to maximise productivity, profitability, and often international competitiveness. Wage and decision making hierarchies thus continued and were extended within and between workplaces, increasingly connected to differential educational credentials. In this climate, divisions and selection processes in secondary school education were further developed.

The focus of secondary school education continued to be on the efficient preparation of politically conscious, trained and specialised personnel. Graduates from secondary school (and University) were to be prepared to fill differential positions within the workplace, based on their academic performance and formal qualifications, so as to maximise the rational use of both natural and human resources. Through academic and vocational specialisation in upper secondary school, and an emphasis on the technical and vocational sub-system, schools were to contribute directly to the goals of heightened rates of economic growth. In short, they continued to be explicitly directed towards the broader goal of creating the material-technical base of socialism, as a prerequisite for realising communism, under the Soviet interpretation of the Marxist-Leninist political project. Political objectives for secondary schools were pursued via the introduction of PCC documents for study within the school systems, highlighting the rights and obligations of students to contribute to the economic development project.

Broad continuity in secondary educational policy emerges, responding to the conditions and particular demands of the national political economy, and the world-systems influence over national economic options, strategies, and the role and structure of public school education in modern society. This process extended the emerging contradiction between specialised and selective upper secondary education, and the communist political project. A degree of socioeconomic differentiation and

'liberalisation'[100] was formally endorsed as the correct strategy to achieve socialism and ultimately communism. On this basis, educational policies to more systematically select, allocate and train school students for these differential positions and sectors of economic and social life became, by definition, consistent with the socialist political objectives of school education. In this way economic conditions shaped the political project and many of its policies and objectives, to produce a national system of secondary school education that was similar to that found in capitalist society.

This chapter identifies the distinctive features of secondary school development, and the nature of the national political economy and world-systems geocultural influence on these features. For the 1976-1985 period, these are seen to be largely concerned with administrative and pedagogical issues aimed at institutionalising methods and practices to efficiently assess students performance, so as to assist in their vocational and professional orientation, and related post-compulsory pathway within the national education system. The resulting structures and practices demonstrate a conditioning world-systems geocultural influence through the centrality of labour preparation (human capital) objectives, and their increasing influence on secondary schools. As in the earlier period, the world-systems influence is felt through the direct impact of the world-economy on Cuba's national economic performance and strategies, which under the post-1970 institutionalisation emphasised hierarchical specialisation.

The structure of this chapter begins with a review of the national context, highlighting two main areas. First, the domestic economic performance is overviewed, noting the ongoing strategy of export led national development, industrialisation and growth. This in turn links the national economy to the world-system, via the continued impact within the CMEA of world market commodity prices, trade and foreign debt.

[100] The term *liberalisation* is frequently used in literature to describe reforms in Cuba associated with decentralisation, material incentives, differentiation, private employment and free markets. It's use often implies that the more centralised, state planning strategy that are being *liberalised* are somehow unnatural or repressive, constraining humankind's natural urges to engage in 'free enterprise' and compete within free market relations (see for example Pérez-Stable 1993a; Bengelsdorf 1994; Domínguez 1989). My use of the term is intended only to categorise the reforms that show an increased influence of liberal capitalist (world-systems) thinking, with respect to economic and social life.

The context is set for national economic conditions influencing and being articulated with school educational policy. Secondly, the review of the national context looks at the social and political developments of the period linked to the domestic economic conditions. In both cases, the influences and implications of the national context for secondary school education are foreshadowed, particular with respect to schools intended political and economic development objectives.

This is followed by a more detailed analysis of official educational policies in these two main areas for the period, using the documentary evidence to establish and describe these emphases. Having described secondary policy in terms of the political and development objectives, the world-systems geocultural influence setting the framework for secondary school educational development is reviewed. In this section the particular policies of secondary school, already identified for their political and economic development objectives, are addressed according to several characteristics indicative of the world-systems influence. A conditioning world-systems influence is asserted, through national economic strategies and planning, and the extension of secondary school reforms related to these national and world-system level conditions.

THE NATIONAL CONTEXT: UNEVEN RECOVERY AND MARKET REFORM, 1976-1985

In the context of the post-1970 institutionalisation reforms initiated in Cuba, the government reintroduced formal, centralised, national economic planning, under JUCEPLAN and the new System of Economic Management and Planning (SDPE). The political and administrative organisation of the country was streamlined, increasing the number of provinces from 6 to 14, decreasing the number of municipalities from 407 to 169, and removing the intermediate administrative layer of regions completely (see Partido Comunista de Cuba 1981, p. 47). Alongside this, the system of *poder popular* that began in 1975-76 was extended to the new provincial and municipal units, providing a forum for the formal participation of citizens in their local affairs. *Poder popular* included control and administration of around 34% of national enterprises (primarily local productive enterprises and services like health and education) being given to the municipal assemblies or organs of Popular Power (Zimbalist and Eckstein

1987, p. 14).[101] The period extended the market style economic reforms and structured forums for public participation in work and local government.

Problems with hard currency foreign debt and world market sugar prices continued, as foreign trade shifted in response between socialist and capitalist countries. After the boom of the mid-1970s, domestic austerity, import reduction and export expansion were pursued at the turn of the decade, with significant negative growth rates for agriculture in 1979 and 1980 bringing down the overall indicators for the 1976-1980 period. Improved performance ensued into the 1980s, however, such that even Domínguez (1989), questioning the official growth figures for the eighties and claiming "massive" Soviet aid and subsidies, acknowledges that Cuba's overall economic performance "was positive on average from 1981-85, outpacing the economic growth of most Latin American countries for the first time since 1960" (pp. 91-2). Petras (1992) refers to the "dynamic growth decade of 1976 to 1985" (p. 18), clearly setting the scene for a general continuation of the recovery begun in the early 1970s.

The first five-year plan, 1976-1980

The official emphasis for the first and second of the new, Soviet style, five-year plans, was on developing the domestic basis for sustained economic development, by strategically targeting imports to those that would assist with industrialisation and consequent import substitution and export expansion. As the hard currency boom of the mid 1970s came to an end through falling sugar prices, and the repayment of foreign debt became a problem, foreign trade with capitalist countries was de-emphasised and greater integration into the CMEA pursued. Investments in industry grew grow both in gross terms and as a percentage of total investments, contributing to the modernisation

[101] As noted in the previous chapter, the extent to which this decentralisation brought authentic decision making power to the local assemblies, and population, is subject to debate. Rodríguez García (1990) asserts that the SDPE and administrative arrangements brought "authentic enterprise autonomy" (p. 159), but goes on to cite a "lack of authentic enterprise autonomy" (p. 185) as a key problem in the late 1980s process of *Recitification*. Critical secondary accounts describe the ongoing centralisation of decision making power over key questions of policy, with the new structures allowing a degree of participation in the implementation of centrally defined policies (see for example Eckstein 1994; Bengelsdorf 1994).

and mechanisation of the sugar industry which stabilised its production (see Partido Comunista de Cuba 1981; Rodríguez García 1990; Brundenius and Zimbalist 1990).

Economic indicators and evaluation

In terms of broad or macro level economic indicators, a favourable performance for the first five-year plan emerges, but with some critical problems in its final years. Figueras (1994) cites an average annual growth rate for Gross Domestic Product (*Producto Interno Bruto or PIB*) of 7% for the whole 1975-1985 period, with an average growth rates for the first five-year plan of 5% (p. 37). Brundenius and Zimbalist (1990) note that growth for the 1976-1980 period was lower than expected, citing a 3% annual rate of growth in national income for the period, the average figure being reduced by rates of just 0.7% and –5.2% in 1979 and 1980 respectively, compared with an average of around 6.8% for the first three years (p. 81).

Other broad indicators of the national economic performance are found in the size and destination of national investments, as a proportion of Gross Social Product (GSP), this in turn impacting on growth rates in specific sectors related to national priorities in the centralised planning.[102] Gross investments continued to expand on the base provided in the early 1970s, already at 2.30 billion pesos in 1975, three times the 1970 level and amounting to 16.4% of GSP. Investments maintained these high levels, peaking at 2.77 billion pesos and 18.7% of GSP in 1977, before falling slightly to 2.70 billion pesos and 15.6% of GSP in 1980 (Brundenius and Zimbalist 1990, pp. 78-9). Rodríguez García (1990) records that 35% of this total investment was directed towards the industrial sectors, compared to just 20% in the preceding five year period (p. 167). Total industrial investments amounted to 4.68 billion pesos, exceeding the foreshadowed amount in the five-year plan by 21% (p. 166). Brundenius and Zimbalist (1990) add that as a proportion of total investment, the agricultural sector fell from 24.3% in 1975 to a low of 16.7% in 1979 and then 21.3% in 1980, whilst investment in industry

[102] Gross Social Product (GSP) was a measure used by Cuba and the socialist bloc, similar to but not the same as GDP. It was based on the gross value of production output rather than the value added, and excluded the value of services (Brundenius and Zimbalist 1990, pp. 35-6).

correspondingly increased from 19.2% in 1974 to a high of 38.5% in 1979 and 36.8% in 1980 (p. 82). This planned shift towards investment and growth in industry, is shown to link directly with the increased emphasis on vocational training in secondary schooling.

Improved domestic performance continued to be influenced by foreign trade, including world markets, finance, and general terms of trade within and outside the CMEA. For example, Petras and Morley (1992) observe that the whole decade was one marked by "economic growth expanding consumption, liberalized markets, consumer spending, and generous Soviet aid," but add that "the structure of the Cuban economy remained basically unchanged … sugar sales and oil re-exports to the Soviet Union continued to predominate in the external sector" (p. 7). Similarly Zimbalist and Eckstein (1987) observe that "CMEA and Western trade and financing came to be central to the regime's recovery from the political and economic crisis caused by the policies of the late 1960s" (p. 17).

As noted in the previous chapter, the historically high world market prices for sugar in the early 1970s produced very favourable terms of trade for Cuba, and were decisive in the post-1970 economic recovery. In these conditions Cuba increased its hard currency loans and imports from outside the CMEA. Rodríguez García (1990) notes a "dependency of the national economy on the world capitalist market" by 1976, with 40.1% of all imports coming from capitalist countries (p. 163).[103] Falling prices for sugar, however, led JUCEPLAN to produce several alternative plans for 1976-1980, finally using a projection of 15 U.S. cents / pound, this being half the 1974 price and approximately the average price for the 1971-75 period (see Brundenius and Zimbalist 1990. p. 80).[104] The average price between 1976 and 1979, however, fell to just 9.65

[103] Variable figures for the proportion of hard currency imports are found in the literature. Rodríguez García (1990), citing figures from the 1977 *Annual Statistics* of the CMEA, puts the percentage at 40.1% for 1976. Eckstein (1994) asserts that in 1974 41% of all trade was "Western trade" (p. 68), without specifying rates for imports and exports. Figueras (1994) on the other hand, noting Europe and Japan's "discovery" of Cuba in the early 1970s and their provision of "gigantic lines of credit," claims that by 1975 imports from countries in hard currency rose to "almost 50%" of total imports (p. 146).

[104] By 1975 the price of sugar was down to 20.37 U.S. cents / pound, compared to the high of 29.66 cents / pound in 1974.

cents / pound (Rodríguez García 1990, p. 164), resulting in some 22 national investment projects being cancelled (Brundenius and Zimbalist 1990. p. 80). The falling capacity of the island to pay for hard currency imports and service its foreign debt was the result.

These external developments conditioned the domestic economic recovery, adding to the impetus for import substitution, the development of new exports, and greater integration into the CMEA. Figueras (1994) observes how hard currency credits began to grow from 1973 as sugar prices climbed, but were then restricted with the fall in prices in 1976, along with a push to reduce hard currency imports (p. 146). Foreign trade with capitalist countries fell to 26.6% of the total in 1980, with a corresponding average growth rate of 10.3% in trade with the CMEA over 1976-1980 (Rodríguez García 1990, p. 171). Soviet imports and exports grew from 40% and 56% respectively in 1975, to 65% and 73% in 1978. Adding trade with other members of the CMEA brings the figures to 76% of total imports and 82% of all exports in 1978 (in Domínguez 1989, pp. 86-95). Characterising the shift, Rodríguez García (1990) emphasises the:

> notable development demonstrated by Cuba's insertion in the socialist system's international division of labour over the 1976-1980 quinquennium, particularly through the CMEA … [based on the 1976] … Agreement on Economic and Scientific-Technical Collaboration between Cuba and the USSR (p. 171).

The trend is clear: as hard currency debt grew and world market prices worsened, Cuba's trade and integration with the Soviet Union and CMEA grew. The agreement of 1976 fixed favourable sugar prices for sales to the Soviet Union, and allowed Cuba to re-export a part of its imported Soviet oil on the world market, contingent on national savings in oil and energy consumption (Domínguez 1989, p. 85). This contributed to a trade surplus with the Soviet Union for the first time ever in 1976 (see Brundenius and Zimbalist 1990, p. 79). According to Domínguez (1989), this favourable trade balance

was maintained over 1977-78, before a quite dramatic reversal, accompanied also with a fall in trade with the Soviet Union, over 1979-1980 (pp. 86-7).[105]

Leaving the debate about Soviet aid aside, it is clear that long term agreements with the Soviet Union and CMEA, combined with the domestic process of industrialisation, stable and mechanised sugar production, and increased national investments, provided a basis for sustained economic improvement amidst worsening world market prices and increased foreign debt. Diaz Vasquez (1980), giving the Cuban interpretation, notes that full participation in the CMEA:

> guaranteed for Cuba a large market, in constant expansion, where the traditional exports of the Cuban economy are sold at stable and secure prices … [and] … are the principal providers of the machinery, equipment and primary materials that Cuba needs (p. 144).

He adds that this integration created the basis for accelerated economic development, something that was an "indispensable condition to complete the process of creating the technical-material base of socialism in the country" (p. 148). Integration and trade with the Soviet Union and socialist bloc was in this way officially presented as integral to the national economic development project.

Finally, this integration did not prevent significant domestic problems from appearing at the close of the 1970s. Recession in 1978-79 brought down the figures for the overall performance of the first five-year plan, with gross investments experiencing negative growth in these two years, and growth rates generally slowing "on practically all fronts" by 1980 (Brundenius and Zimbalist 1990, pp. 81-2). Foreign debt had risen

[105] The potential to overstate or estimate benefits received by Cuba from the Soviet Union in the form of favourable trade, subsidies, credit and direct aid, need to be kept in mind. Brundenius and Zimbalist (1990) in particular highlight the low quality and over-pricing of imports from the Soviet Union, their inefficient shipping, and the fact that Cuba often paid above market prices for Soviet oil (pp 150-153). Even Domínguez (1989), claiming "massive subsidies" that were "crucial for the Cuban government's survival" (p. 81), cites figures showing a worsening in Cuba's terms of trade with the Soviet Union in every year but one from 1976-1985 (pp. 86-87), and acknowledges that "the barter nature of Cuban-Soviet trade … limited the usefulness of the Soviet subsidy to Cuba" (p. 86).

from $1.7 billion U.S. in 1976 to $2.8 billion in 1978, and $3.2 billion in 1979-1980. Thus while world sugar prices recovered slightly in 1979 and 1980, and Cuba again diverted Soviet exports to the world market, debt service payments as a proportion of total hard currency exports were critically high (Rodríguez García 1990, p. 292).[106] These problems were compounded by worsening terms of trade with the Soviet Union, including both increased prices for Soviet oil and falling Soviet prices for sugar (see Domínguez 1989, p. 88). The result was disruption to domestic investment plans, and consumption, as the capitalist world-economy continued to condition the shifting degree of integration and trade within the CMEA, and overall economic performance.

Domestic changes and market reforms

The organisational reforms on the 1976-1980 period were significant, following the lines established in the First Congress of the PCC. The reform program broadly established a more orthodox system of economic organisation, emphasising productivity and profitability criteria in the running of enterprises, stimulated by material incentives for workers and increased wage differentials through an occupational labour hierarchy.[107] As stressed in the previous chapter, this shift was justified as consistent with the application of the 'socialist principle,' after the utopian or idealistic 1960s. Reforms included: the extension of the system of *poder popular* and associated subordination of a substantial share of national economic power and administration to the popularly elected municipal assemblies; the rationalisation of the central administration and creation of new State Committee for Finance and the SDPE to oversee the new system of work organisation; and the restructuring of the Central Bank to provide loans to state enterprises. These reforms occurred under the official political project of creating the material basis for scientific socialism. Under this project, world-systems type goals of maximising productivity and providing income to service imports

[106] In 1978 debt service payments amounted to a massive 72% of hard currency exports, falling to 59.2% in 1979 (Rodríguez García 1990, p. 292).

[107] In describing the reforms as 'orthodox,' I mean closer the dominant, liberal capitalist conceptions of efficiency and profitability within the capitalist world-system, particularly in comparison to the 1960s methods of economic organisation and planning.

and external debt, and increase domestic consumption, were strongly reinforced (see Rodríguez García 1990, pp. 156-72).

Following the 1976 "legalization of certain private sector activity" (Zimbalist and Eckstein 1987, p. 15), Fidel called on private farmers to form still private agricultural cooperatives, as "higher form" of agricultural organisation. These were intended to bring "higher productivity and more benefit to the nation above the individual forms" (cited in Partido Comunista de Cuba 1981, p. 502). The number of Producers Cooperatives consequently rose from 44 in 1977 to 725 in December 1979, and over 1 000 by 1980, involving over 26 000 farmers (see Brundenius and Zimbalist 1990, p. 110; Partido Comunista de Cuba 1981, p. 502). A corresponding move began in the cities, with semi-independent "brigades" of workers being used in industry, and on state farms. The brigades directly linked pay to output, using cost-accounting methods, and had a significant autonomy in terms of national labour legislation, based also in the drive to increase production and labour productivity.

Under this general shift to material incentives under the SDPE, Codina Jiménez (1987) notes that "systems which paid by output were applied to close to a million workers," and that "bonus systems were introduced into different industries to more than 500,000 workers" (p. 135). The establishment of technical work norms continued, covering almost 50% of all jobs by 1979, such that wages were "increasingly linked to productivity … and enterprise performance … [and were] … raised and more closely tied to skill level" (Zimbalist and Eckstein 1987, p. 16). Codina Jiménez (1987) describes the character or nature of the SDPE reforms:

> the utilization of financial categories and mechanisms such as the budget, bank credit, earnings, etc … [to maximise efficiency] … through the most rational use of productive resources (material and human) … [and] … establishing mechanisms that would assure the necessary work discipline, which would contribute to a consistent increase in productivity and stimulate a rise in the quality of production of goods and services (p. 135).

These processes compounded the basic approach to labour that involved a hierarchical system of differential reward for different work, material incentives for greater

productivity and output, and internal labour organisation Taylorist methods (see Brundenius and Zimbalist 1990, p. 132).

A number of key changes in 1980 further consolidated this general trend. This new character of work was heightened by several significant changes in 1980. First, the government approved the 'General Reform of Wages and Salaries' in March, which lifted the minimum wage, but also increased the maximum rate of wage differentiation from a rate of 4.33:1 to 5.29:1 (see Pérez-Stable 1993a, p. 131; Brundenius and Zimbalist 1990, p. 128; Codina Jiménez 1987, p. 136). The official reasoning behind this policy was "to promote the development of technical workers of the highest caliber as well as to motivate the enterprise directors and skilled personnel" (Codina Jiménez 1987, p. 136). The ideology of greater efficiency and productivity through specialist hierarchies is evident in Codina Jiménez's (1987) note that wages for management personnel were to be set:

> according to the different functions and degrees of responsibility they assumed … [and that] … as a general rule, the director should receive a higher wage than other workers in an enterprise (p. 136).

Around the same time the government approved and implemented Decree #32 on labour discipline, which according to Pérez-Stable (1993a) effectively removed the power of 'Work Councils' (and hence workers) to determine wages and work conditions, transferring this power and authority to management. According to Pérez-Stable (1993a), under the new approach "The unequivocal and primary objective of unions was to increase production" (p. 130). The Free Farmers Markets (*Mercado Libre Campesino*) were also approved and began to function in 1980, selling produce from private farmers and the new private cooperatives directly to the public, under conditions of supply and demand, (see Zimbalist and Eckstein 1987, p. 16; Rodríguez García 1990, p. 254).

These processes also involved the expansion of state run 'parallel markets,' selling produce and consumer goods at market prices. Over time these markets reduced the number of goods rationed, increased general consumption, and raised surplus domestic revenue for the government. To this end, Zimbalist and Eckstein (1987) note how just

30% of consumer spending was on rationed goods by 1980, compared with 95% in 1970 (p. 16). Improvements in the provision of consumer goods, by both the state and private interests, would emerge more strongly into the 1980s, further raising consumption and contributing to political stability.

Political problems

One hundred and twenty five thousand Cuban citizens left the island for the United States in 1980, as the government implicitly encouraged those disaffected with the Revolution to leave. The causes and effects of the exodus are multiple, their interpretation varying in accordance with the general perspective of the author towards the Cuban Revolution. Thus for example, Carlos Moore (1988) emphasises the racial composition of those leaving (the vast majority being Afro-Cuban); Bunck (1994) presents the event as a measure of the political discontent of the youth (p. 57); Rabkin (1988) cites alienated youth and associated political problems as being behind the exodus; and Baloyra and Lozano (1993) refer to a combination of economic and political problems, citing increased unemployment, crime, school dropouts, and poor educational outcomes (pp. 197-98).

Leaving aside the detailed analysis of the event, it can be seen as a sign of problems in the intended political education and socialisation of the youth in schools. These areas were subsequently emphasised in the documents of the Second Congress of the PCC the next year (Partido Comunista de Cuba 1981), particularly in the Resolutions on the study of Marxism-Leninism (pp. 406-411), those on educational policy (pp. 422-431); and others on the 'formation of children and youth' (pp. 486-92). The same Congress, however, devoted much attention to the implementation of the SDPE, calling for its "consolidation and improvement" (Partido Comunista de Cuba 1981, p. 259). More efficiently implementing the new forms of work organisation and management, as outlined above, seemed to emerge as the main strategy for improving domestic production, economic performance and consumption, and with this domestic political stability.

Thus while the economic reforms came under scrutiny and ongoing regulation in the Party Congress, the general character of the SDPE reforms and methods to achieve the

"the creation of the technical-material base of socialism" remained (Partido Comunista de Cuba 1981, p. 232). This is apparent in the Party Congress (1981) emphasis on: improving the technical and professional qualifications of managers and workers (p. 237), in line with Fitzgerald's (1990) thesis on creating new professionals; the elaboration and implementation of work norms, linking wages to work output measured against these (p. 238); and improved productivity through saving, reduced production costs, and greater labour discipline (pp. 242-43). That the Congress endorsed a list of some 556 recommendations under the heading 'Principal objectives of the national economy' (p. 250), is indicative of the extent to which the rectification and implementation of the SDPE remained the central focus of government policy. This process brought better results, in economic terms, over the 1981-85 period, though political problems associated with the increased inequality brought in by the reforms began to emerge, particularly as foreign debt and world conditions again provoked domestic austerity measures.

The second five-year plan, 1981-1985

The main objectives of the second five-year plan were to consolidate the gains and tendencies pursued in the first, including: targeted investments for industrialisation, import substitution, export diversification and expansion; reducing external economic dependency; strengthening new forms of domestic work management and organisational; and raising consumption (see Rodríguez García 1990, p. 174). Problems with the implementation of the SDPE reforms, in particular constraints on the flexibility and autonomy of enterprises and their management from central agencies, meant that its improvement and consolidation was a major part of the five-year plan (see Mesa-Lago 1988, p. 64; Partido Comunista de Cuba 1981).

Problems with hard currency foreign debt payments grew, leading to their renegotiation and the promotion of greater economic and trade integration with the CMEA and the imposition of restrictions of hard currency imports. Thus the short-term reduction in trade with the CMEA as a proportion of total trade was reversed. The broad policy options of the Cuban leadership were conditioned in this way by the capitalist world-economy. The internal market reforms, stressing material incentives, financial accountability, private consumer markets and increased managerial autonomy, all

impacted on "Cuban structures and its value system … [that] … created a series of contradictions that the 1986 Party Congress began to confront" (Petras and Morley 1992, p. 19). Before turning to the analysis of educational developments, a review of the shifting economic strategy and performance, and its contradictory political outcomes over 1980-85, is made.

Macro economic indicators and performance

In terms of broad economic indicators, the domestic performance over 1981-85 was significantly better than the previous quinquennium. Modest targets of 5% annual growth in GSP, increased exports, and productivity increases exceeding wage rises were set, in accordance with the SDPE emphasis on realistic planning. The results for GSP exceeded the target, averaging an annual rate of growth of 8.5%. Rodríguez García (1990) cites a 35.6% increase in gross investments for the 1981-85 period (p. 192), and strong overall growth combining with wage increases to produce a massive 40% annual rate of increase in consumption, compared to just 4.3% for 1976-1980 (pp. 192-93). Brundenius and Zimbalist (1990) cite an average 8.3% increase in gross investments, an 8.6% annual rise in national income, and a second economic "boom" in 1981 (pp. 81-87).

The macro figures support the view of substantial recovery and economic consolidation in the 1981-85 period, and contemporary reflections on the bonanza of the eighties. Investment in agriculture increased from the low points of the late 1970s to 26.4% of total investments in 1981, steadying at around 22% for the remainder of the five year period. Investment in industry remained high, at 36.8% of total investments in 1980, and 38.6% in 1985 (see Brundenius and Zimbalist 1990, pp. 82-83). Thus the balance between agricultural and industrial development established with the first five-year plan was maintained. The modernisation and mechanisation of the sugar industry continued, with 62% of all cane cut mechanically by 1986 (Zimbalist and Eckstein 1987, p. 17). Investments in construction and industry increased by average annual rates of around 12%, with significant increases in the domestic production of non-electrical machinery, transport equipment, machinery for the sugar industry (including harvesters), and all important spare parts (see Brundenius and Zimbalist 1990, p. 83).

Figueras (1994) adds that GDP grew at an annual average rate of 9% over 1981-1985 (p. 37), with the rate of investment as a proportion of GDP continuing to grow at 11.8% in 1970; 21.7% in 1974; 23.3% in 1980; 25.9% in 1984; to produce an average rate of 26% for the 1980s that was comparable with OECD countries (p. 42). Under these conditions, Brundenius and Zimbalist (1990) conclude that "most of the overall objectives of the 1981-85 plan were fulfilled" (p. 83), adding that the domestic procurement ratio rose from 24.4% in 1980 to 28.4% in 1985, indicative of success in terms of the import substitution (p. 92).[108] Finally, Codina Jiménez (1987), writing prior to the formal announcement of the *rectification campaign*, summarises these positive features as follows:

> The 1981-85 quinquennium turned out to be one of the most productive periods in the history of the Cuban economy. Real Global Social Product grew at an average annual rate of 7.3%, 5% higher than the figure projected by the Plan, while industrial production grew at an average annual rate of 8.8%. Labor productivity increased at an average annual rate of 5.2% (p. 139).

Foreign trade and debt

Strong evidence of problems in Cuba's foreign trade with the Soviet Union can be found in Domínguez's (1989) analysis, given the emphasis in his work on Soviet aid and subsidies to the island. He notes that Cuba's trade balance with the Soviet Union worsened into the 1980s, such that "by 1984, Cuba had lost over a quarter of the purchasing power of its exports to the USSR; its terms of trade for sugar and oil worsened even more" (p. 89). Thus at the very time that trade with the Soviet Union was increasing as a proportion of the total, the terms of this trade were worsening for Cuba. Figueras (1994) adds that the deficit in external trade increased, as a percentage of GDP, from around 5% in 1980 to approximately 9% in 1984 and 11% in 1985,

[108] The domestic procurement ratio measures the proportion of consumption produced by domestic industry.

attributable to increases in GDP exceeding those of exports, and the worsening terms of trade or exchange prices (p. 41).

Alongside this, Rodríguez García (1990) notes the increased efforts to limit hard currency imports from 1982, as a crisis in hard currency reserves led to first renegotiation of the hard currency foreign debt (pp. 200-201). He adds that 1982 saw falling world market and Soviet sugar prices, and the restriction of Cuba's hard currency earning potential, with reserves falling by 60% from March to August 1982 (p. 201), and payments to service the debt increasing from $619 million U.S. to over $1 billion U.S. (p. 292). While Zimbalist and Eckstein (1987) note a slight fall in real terms of sugar as a proportion of total exports in the 1980s, this limited diversification was insufficient to prevent these serious problems with respect to the foreign trade, and the island's status in the world-economy (p. 18).

The re-export of Soviet oil by Cuba from 1981 onwards rapidly came to account for a large part of Cuba's hard currency earnings, further indicative of the problems in this sector. Zimbalist and Eckstein (1987) note that over 1983-85 hard currency from these sales accounted for 39.5% of the total (p. 18). Pérez-López (1988) cites slightly higher figures using data from Cuba's National Bank, with fuel re-exports accounting for just 10.8% of total hard currency exports in 1981, before jumping to 19.3% in 1982 and averaging 41.8% for 1983-1985 (p. 127).[109] The increased importance of oil re-exports occurred alongside a decline in the total value of hard currency export earnings, which dropped from approximately $1.98 billion U.S. in 1980 to $1.3 billion U.S. in 1985 (Pérez-López 1988, p. 127).[110] On the other hand, these falling values were offset by hard currency import substitution efforts, such that Cuba achieved a surplus in hard currency foreign trade over 1982 and 1983 (Zimbalist and Eckstein 1987, p. 19). Pérez-López (1988) records surpluses in hard currency trade over 1979-1983, with the

[109] The specific figures cites by Pérez-López (1988) are: 40.4% for 1983; 42.7% in 1984; and 42.3% in 1985 (p. 127).

[110] The figures cited by Pérez-López (1988) are in Cuban pesos, being $1.405 billion pesos in 1981 and $1.244 billion pesos in 1985. The U.S. dollar figures have been calculated using the fluctuating official Cuban peso : U.S. dollar exchange rates in Cuba, provided by Pérez-López (p. 150).

significant surpluses of 1981-83 achieved primarily through substantial reductions in hard currency imports (p. 125).[111] This result no doubt assisted Cuba in its renegotiations with the Paris Club, though the trade balance moved into deficit in 1984-85, joining the large overall foreign trade deficits of $1.74 billion pesos and $1.92 billion pesos in 1984 and 1985 respectively (Pérez-López 1988, p. 125).[112]

The debt renegotiation of 1982 covered just 36% of the total hard currency debt, held with the Paris Club, the remainder being with various private creditors. Rodríguez García (1990) records that by March 1983 payments had been deferred, followed by a second process of renegotiation in 1984 and a third in 1985 (p. 203). By 1985 total payments servicing the debt amounted to some $3.75 billion U.S. for the quinquennium, constituting 58.7% of the value of all hard currency exports for the period (p. 204), with an outstanding debt in 1985 in excess of $3.6 billion U.S. (p. 292).

These unfavourable world conditions saw the levels of trade with the Soviet Union and CMEA steadily increase, such that by 1983 both imports and exports to all CMEA countries accounted for over 80% of the total, where they would remain for some time (Domínguez 1989, p. 95).[113] Domínguez (1989) also points to some political tensions between Cuba and the Soviet Union over 1983-85, noting pressure from the Soviets and CMEA on Cuba to fulfil its export obligations and stop diverting exports to capitalist countries when world market prices were high. As a result of this pressure, Cuba fulfilled 99% of its CMEA export obligations in 1985 (p. 108). The increasing trade deficit with the Soviet Union no doubt contributed to this pressure, Roca (1988b) noting that the total trade deficit with Moscow was some $3.12 million pesos over 1984-86, an

[111] The surplus figures, in millions of pesos, are $355.1; $749.9; and $455.7 respectively, translating in $ U.S. figures as $428.9; $899.8; and $528.6 million.

[112] The 'Paris Club' is an international group of private European creditors.

[113] Domínguez (1989) puts exports and imports respectively at 82 / 84% for 1983; 85% / 80% for 1984; and 86% / 81% for 1985 (pp. 94-95). Adding trade with the Peoples Republic of China and other non-CMEA socialist countries, Roca (1988b) cites official statistics to put the figure for 1981-1985 at 85% for both imports and exports (p. 106).

amount roughly equivalent with the net deficit of $3.16 million pesos over 1970-1983 (p. 115).

The external conditions thus continued to constrain the performance of and options available to the Cuban economy into the 1980s, promoting greater dependence on the socialist bloc despite the less than favourable terms of trade encountered by Cuba. Using an index setting 1975 at 100, Domínguez (1989) records how the terms of trade for sugar and oil with the Soviet Union declined drastically from 72 in 1980 down to 40 in 1982, staying at around this rate over 1984-85. The overall terms of trade with the Soviet Union declined less dramatically, but the trend was similar, falling to 67 in 1982 and low 70s for 1984-85 (p. 87). Pérez-López (1988) provides a further example, noting how the post-1975 formula of the Soviet Union setting oil prices using a "multi-year moving average of world market prices" (p. 132) saw the price of Soviet oil exceed world market prices over 1984-1985, as world market prices for oil dell dramatically from 1983 (pp. 134-35).

Underlying the positive macro indicators for the domestic performance then, foreign trade both within and outside the CMEA continued to cause problems, whilst an apparent dependency on exports for domestic performance remained.[114] Strong evidence of the influence of the capitalist world-system on Cuba's domestic performance thus emerges.[115] In 1984 Cuba reached a long term economic accord with the Soviet Union (the PLP – *Programa a Largo Plazo*, or 'Long Term Program') designed to further consolidate and improve Cuba's integration in the socialist international division of labour under the CMEA (see Roca 1988b, pp. 111-17). Thus the general strategy seemed to remain in place, with Fidel announcing that the main objectives of the 1986-

[114] See table 5.1 in Roca (1988b) which demonstrates how exports as a percentage of GSP averaged approximately 9.6% over 1962-1973; before increasing to 16.6% in 1974; 21.2% in 1975; and an average of 20.9% over 1976-1985 (p. 104).

[115] In this context the government made its first serious efforts to attract direct foreign investment, approving a foreign investment code in 1982 that allowed foreign capital to "own up to 49% of local enterprises, to repatriate profits, and to control labor, pricing and production policies" (Zimbalist and Eckstein 1987, p. 19).

1990 plan and beyond were to increase hard currency earnings; fulfil export investment commitments with the socialist bloc and improve domestic economic efficiency (cited in Roca 1988b, pp. 116-17). The 1981-85 period thus brought growth, consumption and stability, but some underlying problems that would become more acute as the *rectification campaign* emerged.

Ongoing domestic market reforms

A number of significant changes in the domestic forms of work organisation and relations occurred in the 1981-85 period, in line with the character of the SDPE and the initial steps of its implementation in the preceding period. These changes extended the use of material incentives and the potential for wage differentiation, as more flexible arrangements were made through increased enterprise autonomy and the use of work brigades with pay linked to production and flexible working conditions. Private employment, production and sales also increased, as did the use of monetary-market mechanisms. At the same time, the review and regulation of the reforms or liberalisation, based overtly in politics-ideology, continued. Efforts were made, for example, to institute a registration and tax system for the self-employed and those selling goods in unregulated markets. Major rectification of these reforms would begin in 1986.

Significant changes under the SDPE reform included limited self-employment, the state parallel markets, the free farmers markets, and a general raising of rationed and parallel market provided goods in 1981. Private contractors for housing construction were permitted from 1980, with state housing construction cooperatives encouraged from 1981. The former accounted for 24% of total housing construction in 1980, increasing to over 30% in 1984 and 1985 (see Mesa-Lago 1988, p. 73). Additionally, a new housing law in 1984 promoted the conversion of tenants into home owners by converting existing rent payments into purchase payments, this politicised measure ironically promoting increased private construction and sale, as well as the speculative purchase and re-sale, of houses.

Mesa-Lago (1988) adds that the implementation of the new labour or work norms, bonuses and incentive funds within industries was extended, and attempts were made to

improve the substance and functioning of enterprise management autonomy (pp. 64-65 and 73). These specific changes to the domestic organisation of work were part of the more general process, in line with the Soviet reforms of the mid-1960s. Most distinctively the national context, and its economic, organisational and institutional reforms, strengthened the hierarchical division of society in terms of wages and status, under the 'socialist principle'. This occurred through the wage reform, the reassertion of management expertise and authority, and the creation of a technocratic and political elite to oversee the running of the national economy, effectively limiting popular participation to the implementation of elite determined plans and policies. It is in this context, with increased private employment and an emphasis on material incentives and monetary cost and profit accounting, that the analysis of secondary school education reform is made.

A number of key points can be made from this review of the economic and sociopolitical context of Cuba over 1976-1985. Firstly, there are clear signs that even in the context of Cuba's integration into the CMEA, capitalist world markets, trade and finance, and unequal exchange continued to influence national economic performance and policy options. This influence is seen in the shifting emphases in trade between the socialist bloc and capitalist countries, and in the underlying strategies of financing development through commodity exports. The geoculture of development within the world-system adds to this conditioning influence, promoting policy options and strategies intended to maximise the efficiency and productivity of national industries, directed towards industrialisation, growth, and national economic development. This world-systems influence, extended by Soviet collaboration, is apparent in the specific market style policies and reforms of the Cuban government in this period. The world-systems geoculture can also be seen in the specialisation and differentiation of the labour force under the economic reforms, influenced by the same development based concerns for efficiency and productivity. These divisions brought socioeconomic inequality, increasingly based on formal educational qualifications.

On one level, secondary school educational policies and practice responded to these conditions. This response continued and extended the trends already established, redefining the communist political objectives of secondary schooling in terms of

students contributions to socialist economic development plans. On a second level, the human capital perspective of preparing skilled and specialised labour through the secondary school system was further entrenched, while formal and systematic selection procedures were established to support the explicitly meritocratic differentiation of upper secondary students, in correspondence with national economic planning. It is to the analysis of these processes that I now turn.

SECONDARY SCHOOL DEVELOPMENT AND REFORM IN THE NATIONAL POLITICAL ECONOMY

Official policy, structures, and approaches to secondary school education in Cuba in this period continued to be based in political socialisation and economic development objectives. As implied in the review of the national context above, economic development objectives were dominant in the major reforms of secondary schooling in this period. The socialist and communist political objectives of secondary schools were thus shaped by the emphasis on efficient economic development and growth, and the political obligation of graduates and citizens to effectively contribute to this project. In this way the national political economy, constrained by the country's participation in the capitalist world-economy, influenced the official educational response to the priorities articulated by the government.

Conditioning these national processes and outcomes were the world-systems geocultural influences on the general conceptions of the functions and importance of school education to the project of national economic development. In this process the most explicitly political or radical objectives of school education were conditioned by the world-systems influence. The communist formation of students in schools largely involved notions of a favourable attitude towards work; desired work habits; and a willingness to train in targeted vocations, in accordance with identified levels of 'ability' and vocational orientation.

In the context of the world-systems geocultural influence, and the broader institutionalisation and the directions of the national political economy under the SDPE reforms, questions of secondary educational structures, specialisation, and procedures for the meritocratic selection of students and their allocation into hierarchical post-

compulsory sub-systems or specialisations were predominant. Additionally, efforts to improve teacher training and upgrade existing teachers qualifications continued, alongside detailed instructions for school executive and teaching staff with respect to content and teaching methods. With the economic development objectives already well established as the dominant influences on secondary educational development, structures, methods and practices to most efficiently meet these objectives followed. The type and character of these reforms are reviewed from the perspective of the world-systems geocultural influence, within the revolutionary socialist state.

Major developments in secondary school education, 1976-1985

In comparison with the Congress on Education and Culture and consequent development of the *perfeccionamiento* process in the 1970-75 period, events and reform initiatives for school education over 1976-1985 were, at least publicly, less dramatic. Significant events dealing explicitly with the intended function of school education did take place, however, in the form of the PCC's stated educational policy implemented by government. Additionally, the PCC (1978) elaborated its 'Party Program and Platform,' reaffirming the general principle of socialising students in scientific, ideological and moral principles, to be ideally converted into personal convictions and habits of daily conduct. This socialisation, in turn, was intended to facilitate their integral development and preparation to work and live in the socialist society (p. 86). Once again raising students levels of professional qualifications and training, in response to the planned requirements of national economic development and related outcomes, were endorsed alongside and within the communist political goals.

At around the same time, a legal *Code on Children and Youth* was approved by the national assembly in June 1978, detailing amongst other things the "attributes and qualities" to be developed in students in line with their Communist formation (Partido Comunista de Cuba 1984, p. 10). The document stressed the importance of the school in this process, reinforcing the official position of communist education as the preparation of students with a "love of work and study … love and respect for the socialist homeland" (p. 10), guaranteeing their "cultural, productive and technical preparation … according to the planned development of the economy" (p. 13). Article 44 of the Code went on to note that the differential payment of young school graduates, under the

socialist principle, "stimulates them to achieve high levels of productivity, acquire greater work capacity and obtain higher skills" (Partido Comunista de Cuba 1984, p. 19). The connection with the Soviet style market reforms in the economy, and broader world-systems geocultural influence on the project, are apparent.

The Second Congress of the PCC in 1981 produced similar statements of broad educational policy and objectives, with a range of resolutions for school education and the formation of children and youth generally. Here too the political and economic objectives were combined, further reinforcing the identified trend. Within and between these particular events, policies, statements and discussion about the reform and practice of secondary school education continued, with the broad restructuring under *perfeccionamiento* being progressively implemented over 1976-1980. Ongoing reforms, focusing around the school educational implications of the economic development objectives, continued under the banner of 'continuous improvement' (*perfeccionamiento continuo*).

The two sections that follow are structured to review formal policy documents and reforms, and secondary literature primarily from within Cuba, related to the broad, established objectives of secondary school education. Links are outlined between the documentary evidence and the two major categories or areas of influence on them, within the context of the national political economy. At a number of points, links between these domestic educational reforms and the world-systems geocultural influence are foreshadowed. These connections, and the nature and mechanisms of this conditioning as a means of explaining the development of Cuban policy, are more fully developed in the subsequent section.

National political objectives

The previous chapter outlined the introduction of the new political subjects into the curricula of general secondary education and its sub-systems (see p. 161). In addition to these, the goal of promoting students' communist formation across all formal subjects was repeatedly invoked. This was frequently defined as promoting the development of a materialist or scientific conception of the world, and attitudes and habits identified as part of the ideal, 'communist personality,' across the school curriculum. The goal was

clearly for students to convert the prescribed communist morals and principles into personal convictions and habits of daily life (see for example Labarres 1982, pp. 9-10). Writing in the teacher education journal *Varona*, Viciedo Domínguez (1982) similarly affirmed the importance of developing a scientific conception of the world in students communist formation, with systematic content and teaching programs directed towards students becoming "conscious of the essence and tendency of social development" (p. 74).

Political content for secondary schools

In response to this part of the *perfeccionamiento* process, and the accords of the First Congress of the PCC, Ministerial Resolution 713/76 mandated that material, accords and resolutions from the First Congress of the Communist Party be systematically included in a full range of subjects within all sub-systems (see Fernández 1977d, p. 88).[116] To this end, "methodological guides for each subject" were prepared and distributed to teachers, detailing the specific materials to be used in each subject and how it was to be incorporated in the subject (Fernández 1977d, pp. 88-89).[117] Additionally, Education Minister Fernández (1977h) advised teachers that the Ministry would ensure that all new school texts were written under the official Marxist-Leninist framework, and that "critical introductory notes" would be provided for existing texts that did not conform to the political requirements (p. 29).

In line with this trend, a text about the jailing of Fidel and his comrades in 1953 following their attack on the Moncada Barracks, *The Fertile Prison (La Prisión Fecunda*), was introduced across curricula under RM 680/80. As part of the project of converting communist principles and attitudes into personal convictions, the Resolution

[116] The sub-systems are listed in full in the section below on SECONDARY SCHOOL DEVELOPMENT AND REFORM IN THE WORLD-SYSTEM, p. 240.

[117] Full details for each subject were annexed to the Resolution. Subjects affected ranged from the explicitly political "Fundamentals of Political Knowledge" and "Fundamentals of Marxism-Leninism," to the subjects: "History of Cuba" and "Contemporary History"; "Literature"; "Spanish Language"; "Geography"; "Mathematics" and "Physics." The content included extracts from the Central Committee's report to and Resolutions of the First Congress; the Party Platform; and various 'theses' of the PCC such as those on social and economic development (see Fernández 1977d, pp. 92-97).

outlined its incorporation into the History; Social Science and Political-Social programs from 1980-81 (Fernández 1981d, p. 101). The action was presented in terms of helping students to appreciate:

> the values of Fidel as a leader … his heightened theoretical thought … his tenacity and unswerving discipline … [and] … the attitude of the group of survivors that all moments maintained high revolutionary principles (Fernández 1981d, p. 102).

Contributing to the legitimacy of the revolutionary leadership under Fidel, and hence a more general, active or passive, political loyalty, was arguably a part of this policy, coming in the wake of the Mariel exodus. Regardless of the extent to which these events motivated the policy, the characteristic of political formation as a means of socialising citizens loyal to the political and socioeconomic system of the state can be seen.

This inclusion of political content to be acquired by students was also influenced by the official Soviet interpretation of Marxism-Leninism, as expressed by Fidel and other national leaders and organisations. This was apparent in the statements of the 'IV Conference of Public Education Ministers from Socialist Countries' (VI Conferencia de Ministros de Educación Pública de Países Socialistas 1982) which in a way similar to the Congress on Education and Culture in 1970, exhorted teachers to struggle against "ideological deviationism" generally, and "antisovietismo" in particular (p. 36). In short, the content for the political formation of students was to reflect general Soviet (and Cuban) policy on the questions of Marxist-Leninist theory, international relations, and attitudes towards other revolutionary movements (pp. 37-38). The conference thus emphasised teachers' roles as "implacable defender(s) of Marxist-Leninist ideology and socialist morals in all aspects of life" (p. 36), raising students political formation to the centre of educational objectives, but in a way that would promote support for the socialist state, its policies and institutions.

A second major area of reform in this period, within the category of political objectives, relates to the training and re-training of teachers specialising in the subject area of Marxism-Leninism. RM 652/80 began preparations for a "National Theoretical and Methodological Seminar for Teachers of Marxism-Leninism" to be held in June

1981. Papers were to be selected from municipal seminars for inclusion in the national conference, focusing on the content of the existing school programs and their potential and actual role in students' communist formation.[118] The following year RM 388/81 called for municipal MINED "methodologists" to make periodic visits to schools, particularly in the technical and vocational sub-system, to assess, monitor and control the teaching of Marxism-Leninism, and provide support for teachers (see Fernández 1981a, p. 108).[119]

More national meetings and conferences followed in the 1980s. RM 99/83 announced the "IV Scientific-Methodological Conference on the teaching of Marxism-Leninism and History" to be held in November 1983 (Fernández 1983b, p. 50). May 1984 saw the "III National Theoretical-Methodological Seminar on the teaching of the subjects of Marxism-Leninism in the basic secondary level of Education," with municipal offices of MINED selecting papers for the national forum (Fernández 1983c, p. 115). The themes outlined for the conference in RM 109/83 (1983c) included: preparation and development of the class; methods for "high levels of assimilation" (p. 116); and work with PCC documents, the state and mass media institutions (p. 117). These national forums are indicative of ongoing efforts to improve the teaching of the new subject content, and the extent to which the content knowledge was assimilated by students.

Two other Resolutions from the Ministry of Education are relevant here, approaching the question of students' political socialisation from slightly different angles. The first of these involves the procedures and structures for the selection of students, and their allocation into different sub-systems and specialisations at upper secondary level. As is discussed in more detail below, this was a major feature of the reform in this period,

[118] As noted earlier, the existing subjects for secondary school, introduced under the *perfeccionamiento*, were: 'Fundamentals of political knowledge' for year 9 level; and 'Fundamentals of Marxism-Leninism' for year 12 level (see Fernández 1981c, p. 97).

[119] The term 'methodologist' is a direct translation of the Spanish term *metodólogo*. These MINED were effectively acting as inspectors, monitoring the implementation of and adherence to educational policies and regulations; the realisation of objectives; and the specific teaching methods used.

with the established procedures using traditional methods of selection based on performance in academic examinations and accumulated student records. Additionally, however, they included an assessment of students' political performance, particularly in the high status academic pathway of preuniversity, or the selective IPVCEs. For example, RM 101/80 established *Enrolment Commissions* to evaluate students' "political morals," including their attitudes and actions with respect to the established norms of socialist coexistence, and "in relation to the principles and ideology of our Socialist State, consecrated in the Constitution of the Republic" (Fernández 1980a, p. 114). Specific criteria to measure students political record, to be found primarily in their accumulated school record, included their fulfilment of study and work obligations, attendance at political-military activities, and recorded attitudes towards study, social property, religion, leaving the country, and other criteria (Fernández 1980a, pp. 115-16).

This was an attempt to assess and reward socialist or revolutionary political behaviour and attitudes, by including it in the formal criteria for selection into high status educational pathways. Students who did not meet the required level of political formation were to be re-directed to the technical and vocational sub-system, to train as qualified workers or intermediate-level technicians. Economic development criteria in the definitions of students' political formation, however, were increasingly prevalent. Hence this process emerged, to some extent, as part of the economic development objectives, selecting and sorting students into differential training for the optimal use of human resources.

A second more radical policy, implemented in 1977, involved volunteers from the student-teachers training in the 'Manuel Ascunce Domenech Pedagogical Brigade,' being called upon to undertake internationalist service in the Popular Republic of Angola. Ministerial Resolution 663/77 grouped these volunteers to form the first 'Che Guevara Internationalist Pedagogical Brigade,' (Fernández 1978b, p. 120). Under this more radical measure, student teachers would be politically trained through the practice of providing the social service of school education in the newly liberated African state of Angola, embarking on a progressive political project and under attack from the apartheid military forces of South Africa.

Communist formation

As noted in previous chapters, this ongoing commitment to forming new socialist citizens, evident in both of these policies, needs to be seen in the context of the official definitions of the new type of citizen to be socialised in schools. These definitions continued to involve an integrally developed personality, and a combination of attitudes and behaviours related to national and international politics, and the question of work for national economic development. A strong feature of the desired communist personality was students internalising their socialist rights and obligations in the new society, to guide their daily work and sociopolitical behaviour. Again the world-systems geocultural influence is evident in the character of these objectives, creating members of the new state, loyal to the homeland, and accepting their rights and obligations in political and socioeconomic life.

In this context a personal commitment to the international communist cause, as defined by Soviet and Cuban foreign policy, was sought. Calls for disciplined hard work were couched in terms of a politically conscious attitude towards work in the socialist society under construction. This continued into the 1980s, with Manzano Anovega (1981) referring to the "norms of communist morals" as socialist patriotism; proletarian internationalism; and the aspiration to actively participate in social and political life of the country and defend its ideas and convictions (p. 81). Similarly the politicised attitude towards work involved developing students' respect for workers and their collectives, and their desire and capacity to consciously work in a collective for the benefit of the country (p. 82). A more explicit economic development basis for the communist formation is seen in the intended internalising by students of an intolerance of negligence, indiscipline and irresponsibility, in themselves and others, with respect to work (Manzano Anovega 1981, p. 82).

A good example of this combination, through which national economic development objectives were expressed as part of students' communist formation, can be seen in Miranda's (1984) review of post-revolutionary educational development. Here the *perfeccionamiento* implemented from 1975-76, and the subsequent process of "*permanente perfeccionamiento*," are expressed as allowing the national system of education to:

> respond to the necessities put forward by the socialist development of the country, that is, to prepare intermediate and high level technicians, and qualified workers, with a better communist formation, in the specialisations that the economy requires, in the number and quality required (Miranda 1984, p. 82).

Once again the political attitudes and behaviours of students were clearly shaped by the identified demands of the national economy, and hence plans for social and economic development. Communist formation became technical preparation for efficient work.

The incorporation of Party documents into secondary schools was a part of the process of preparing citizen members of the socialist state, loyal to its forms of political and socioeconomic organisation, and prepared to work for its development. Thus following the mandates of RM 713/76 cited above, the incorporation of Party documents from both the First and Second Congresses of the PCC continued into the 1980s. This policy was defended by Cueto Sanchez (1983), however, who argued that the study of such documents was not just directed to students "appropriation of knowledge," but that it included:

> cognitive objectives as the basis for them to develop communist convictions, habits and abilities like … the capacity of students to defend and demonstrate the advantages of socialism over communism; adopting a critical position towards ideological manifestations contrary to socialism (p. 6).

Cueto Sanchez (1983) affirmed the value of Party documents to students' political-ideological formation, given that the Party decisions involved the application of Marxist-Leninist theory to the concrete situation of the country (p. 7). He also acknowledged that the incorporation of these documents into subject content by teachers had often been "superficial and erroneous," highlighting the need for teachers themselves to better internalise the content and ideology of the documents (p. 11). Thus the official policy was maintained, citing the meaningful study of the content of Party documents, theses and decisions as assisting the communist formation of students.

The underlying premise was that communist education, rather than occurring spontaneously, had to be planned and organised in a detailed fashion. For example

Alonso Febles (1981) cites the importance of the deputy principal's work in the ESBECs and IPUECs, to "organise, direct and control the internal life of the students, their activities, and contribute to their formal education" (p. 17). Morales Pérez (1982) describes developing students' moral (political) formation in terms of patriotism, internationalism, collectivism, and socialist attitudes towards work, something to be achieved by having students "assimilate behavioural habits and customs on how to behave in public and follow the social order" (p. 35). In statements like these, students' communist formation was clearly linked to behavioural norms for members of the socialist state, including but not restricted to those related to work. Citing Makarenko's work, Cuellar Ortiz (1983) added the importance of students' incorporation into the collective, and the teaching methods used to best develop the sense of collectivism within student groups, and promote students' sense of obligation to the collective to fulfil their individual tasks (p. 48).

Additionally, attention was given to specific subjects and methods to enhance their contribution to students' communist formation. The subject of history was thus presented as integral to developing students' "love for the homeland, … [and] … faith towards communist ideals and internationalist obligations" [Lovelle Rodríguez, 1984 #444, p. 4]. This was to be developed through the correct interpretation of historical events "in accordance with Marxist-Leninist ideology" [Lovelle Rodríguez, 1984 #444, pp. 5-6]. In this way, conventional classes and school structures were to contribute to the communist formation of students through the inclusion of the politicised content and, in the case of history, the interpretation of events. To this end Jiminez Montejo (1985) outlined class seminars to be used within the political subjects, following students' acquisition, consolidation and extension of basic knowledge, to promote the application of Marxism-Leninism and dialectical thinking through discussion and the exchange of opinion. Quiala Hidalgo and Rivas Tamayo (1985) offered details on the incorporation of the text, *La Prisión Fecunda*, in accordance with RM 680/80, into the subject fundamentals of political knowledge, outlining excerpts from the text to be used with different themes developed within the subject, and providing specific questions and suggested activities for teachers.

Finally, the term and objective of communist formation was used in this period to justify objectives that were directly related to processes of instilling discipline in socialised citizens of the socialist state, and strengthening state authority. This emerged in the official emphasis on 'formal education' in this period, following a speech by Fidel in 1976 in which he raised the issue (Castro 1976b). Motivated at least in part by problems with labour and student indiscipline (see Bengelsdorf 1994; Eckstein 1994; Pérez-Stable 1993a), the push saw questions of students dress and appearance, language, manners and behaviour become the subject of official policy, under the broad banner of communist formation (see for example 1977a; 1977b; López Padron 1984). This promotion of conservative cultural norms of behaviour was linked to the Soviet influence, and the particular definitions of the desired socialist citizens, as self-disciplined members and workers in the socialist project.

The Cuban literature thus reflects the emphases within the Ministerial Resolutions, with respect to the communist formation of students in secondary school. That is, a focus on schools use of PCC materials, integrated into both specialist political and regular subjects. Students were to internalise the official policies and Marxist-Leninist ideology of the Party and state, and demonstrate through their behaviour attitudes and habits in accordance with the formal definitions of communist education. Within these policies and statements, the world-systems geocultural influence can be seen in the direct and indirect goals of socialising obedient citizens of the socialist state who were effective workers for its program of national economic development.

Within these policies for the inclusion of political content into schools, there is an apparent potential for what subsequent criticism in Cuba identified as 'formalism' (*formalismo*) to occur, undermining the authentic socialisation of communist citizens. That is, the potential for students' education in Marxism-Leninism, via formal teacher led classes using Party documents, to revgress into their uncritical reproduction of the official political line. Some evidence of this emerges directly in the literature towards the end of this period, and indirectly in acknowledged problems in the political formation of the youth generally. This points tentatively to a further contradiction in the system, with the content of, and methods for achieving, students communist formation arguably working in favour of a superficial political formation.

The extent to which improved preparation for work through secondary school education extended its influence over policy and reform is developed in more detail below. This influence was consistently evident, however, in the expressions and definitions of communist formation. That is, through the importance of plans for national economic development to the political project generally, and the related goals of developing in students a "communist attitude towards work, social property, study and society" (Sus Pompa, Menéndez Blanco, and Bernal González 1986, p. 110). Thus, the trend of the national political economy, and expressed economic development objectives, conditioning the more radical political objectives continued. In the discussion of the policies based in the economic development objectives, and the section identifying world-systems influences that follows, the conditioning role of the world-systems geoculture over the national context and national model of secondary school education is reinforced as a viable approach to explaining the development of the Cuban model.

National economic development objectives

The formal objective of linking the national secondary education system with plans for economic and social development had been a consistent and fundamental feature of secondary educational policy since 1959, within the project of overcoming the country's underdevelopment. This trend continued through the 1976-1985 period, reinforced by the Soviet styled perspective of distinct, scientific stages in the construction of socialism and communism, based primarily on 'levels' of material and technical development of the economic base. Thus for example, in his annual listing of MINED priorities for teachers and education workers for the 1977-78 school year, the Minister of Education called for attention to education's "correspondence with the level of social and economic development of the country and the demands of our socialist society" (p. 26). With respect to specific policy this attention focused, as it had done previously, on students preparation for work, through providing work related technical skills and promoting a range of desirable habits and attitudes towards work. In this sense the reforms shared, and in many respects were a part of, the emphasis of economic policy on efficiently using material and human resources to achieve socialist development.

Technical and vocational education

The most apparent sign of economic development objectives influencing the development of secondary educational was the promotion and systematic reform of the sub-system of 'technical and vocational education' in the period. This secondary school level training had been provided within this broad sub-system in different forms, with the objective of providing the national economy with the required numbers of trained workers and technicians for specific industries and sectors, so as to directly assist the socialist development project. Following the First Congress of the PCC and its *Política Educacional*, Ministerial Resolution 656/76 reaffirmed this objective, and established a more systematic and unified process for the two distinct levels of technical and vocational training carried out in this sub-system: "qualified workers" (*obreros calificados)* described as workers in production or service industries; and "intermediate level technicians" (*técnicos medios*) described as directors, supervisors and technicians (Fernández 1977a, p. 55).

The Resolution also established the polytechnical schools and institutes as the principal providers of this training within the technical and vocational sub-system. The polytechnical schools (*escuela politécnica*) were to initially provide 2-3 year courses for qualified workers, recognised as the equivalent of basic secondary schooling (year 7 to 9), with students entering directly from primary school. The educational level required for entry into the schools, however, was to be gradually raised over 1976-1980 to the compulsory year 9 basic secondary level, and the courses reduced to 1-2 years. Similarly the polytechnical institutes began training intermediate-level technicians from primary school in 3-4 year courses, but post 1977-78 all enrolments were to have a minimum of basic secondary, whilst some year 12 graduates were admitted (see Fernández 1977a, pp. 56-57). For the second five-year plan (1981–1985), Fernández (1977a) announced that almost all students in the polytechnical schools would be basic secondary graduates doing 1-2 year courses; whilst the institutes would include both basic secondary graduates doing 2-4 year courses, and year 12 graduates doing one to two year courses (p. 57).

The polytechnical schools and institutes were organised into three broad categories: agricultural; 2) industrial; and 3) economy and administration. Within these, RM 656/76

established seventeen broad areas or fields of study within the sub-system, that were based around branches of industry.[120] Each of these was then broken down into specific specialisations, for both levels of training, resulting in some 277 distinct specialisations for qualified workers and 155 for intermediate-level technicians (Fernández 1977a, pp. 55 and 63-72).[121] The reform thus continued and extended the long standing approach to preparing specialised labour to new levels of detail. The reasoning behind this was clear since, from the outset, it was asserted that this degree of specialisation in basic secondary level would:

> permit the successful fulfilment of the social responsibility of this type of education, that is, to train qualified workers and intermediate-level technicians … in accordance with the necessity of a qualified workforce for the economic development of the country, and to guarantee that the professional preparation corresponds with the advances of the Scientific-Technical Revolution (Fernández 1977a, p. 55).

The specialised training within this sub-system, at the post-compulsory upper secondary level, was thus designed to produce graduates entirely prepared to move from education to work within their specific trade or vocation, in the numbers required by the national economy.

This emphasis on the technical and vocational sub-system had been endorsed within the *política educacional* of the Cuban Communist Party, and reaffirmed at its Second Congress in 1981. Thus Fidel noted in his central report to the Congress that the formation and training of specialists and technicians "must be closely linked, in the number and structure of specialisations, to the requirements of the process of the

[120] The fields or *ramas* of study included: Geology & Mineral Prospecting; Mineral Exploitation; Construction of Instruments and Machinery; Electrical Machinery; Metallurgy; Energy; Communications and Radio-technology; Chemical Technology; Food Technology; Light Industry; Surveying; Construction; Cartography; Forestry; Agriculture; Economics; and Transport (Fernández 1977a, p. 55-56).

[121] This level of specialisation, as part of increasing push to achieve development through expertise and scientific training and use of trained professionals, is also addressed in the section on *Educational development and reform in the world-system* below.

utilisation of labour resources" (Castro 1981, p. 64). Resolutions from the Second Congress similarly endorsed ongoing increases in enrolments in the sub-system, so that the country could "count on young intermediate level technicians and trained workers, professionally prepared for the current and future demands of the economic development of the nation" (Partido Comunista de Cuba 1981, pp. 426-27). Such statements, reaffirming existing policy, were made in the context of the expressed main objective of the 1981-1985 quinquennium:

> to complete the creation of the technical-material base of socialism … [this being the construction of a] … general productive structure directed to the development of the forces of production of society, and in this context, obtain an increase in the efficiency of social production through the maximal exploitation of basic funds, natural resources, primary materials, energy, and exploitation of the availability of labour resources, in this way achieving high rates of work productivity (Partido Comunista de Cuba 1981, p. 232).

These statements followed related calls to lift the proportion of students studying within the technical and vocational sub-system, and the 'promotion rates' or number of students passing all their subjects as a proportion of the total enrolment in the sub-system (see Denis Domínguez and Melgares Reyes 1979). The explicit argument behind this was the importance of the sub-system to the economic development plans of the state (Denis Domínguez and Melgares Reyes 1979, pp. 40-41).

This reform of technical and vocational education within the national system thus involved its promotion and expansion, in the context of the more systematic effort to achieve planned economic development. The result was increased resources and numbers of upper secondary students going into this sub-system. Thus as noted in the previous chapter, Epstein (1988) records significant increases in the numbers of students and teachers in the sub-system between 1970 and 1983 (p. 268). In addition to this, Marichal (1982) notes that by 1980-81 some 292 polytechnical centres were functioning with a total enrolment of over 190 000 students, compared with just 15 000 students prior to 1950 (p. 41). He adds that as of 1980-81 over a quarter of a million intermediate-level technicians and qualified workers had graduated since 1959, and

most indicative of the post-1970 emphasis on vocational training, over 50 000 students had graduated from the polytechnical centres in 1980 alone (p. 41).

In further evidence of this increased emphasis on vocational training, Minister Fernández (1986c) noted that over 1981 to 1985 some 411 821 students graduated from the technical and vocational sub-system, this figure being more than double the graduates from the upper secondary preuniversity institutes (p. 27). Statistics for the whole sub-system had total enrolments doubling from 114 653 in 1975-76 to 228 487 in 1980-81 (see Cuadro 5 in Varela Hernández et al. 1995, p. 106; MINED 1995a). The increase continued, moving to 307 129 for the 1985-86 school year (Varela Hernández et al. 1995, p. 106; MINED 1995a).[122] The rationale for the sub-system remained "to train the intermediate level work force that the economic development of the country requires" (MINED 1986, p. 26). The concentrated expansion in the 1970s and 1980s was explained in terms of the national economy establishing the basis for socialist development, within which "The formation of técnicos medios is a determining element in this process" (Marichal 1982, p. 46).

A final measure, to illustrate the growing significance of this sub-system over the 1976-1985 period, can be seen in the proportion of all students enrolled in the sub-system. The MINED (1986) report to UNESCO records that there were 606 700 graduates from the technical and vocational sub-system over the 1976-1985 period, out of a total of 2 538 200 secondary school graduates (p. 66). This amounted to some 24% of all secondary school graduates, the total figure including those graduating from the compulsory basic secondary level, being within this sub-system. Given that the majority of students entered the sub-system after basic secondary education, particularly after 1980, this proportion is more significant. Indeed, over the same period only around half the number (307 200) graduated from the upper secondary level preuniversity sub-

[122] These figures represent enrolment in both institutions under the control of MINED (ie. polytechnical schools and institutes focusing on industry, agriculture or the economy); and "training institutions run by other state organisms" (described in MINED 1986, pp. 28-29). Under this process of expanded and more detailed training in the poytechnical schools and institutes, they provided the bulk of this type of training.

system, making technical and vocational training by far the most the most significant form of post-compulsory level school education.

These statistics and comparisons highlight the extent to which secondary school education policy continued to be shaped by the project of national economic development. Additionally, a clear connection with Cuba's national economic planning can be seen, within the context and constraints of the world-economy, shaping educational structures and the types and content of training provided in them.

Hierarchical specialisation for greater economic performance

The issue of this emerging specialisation of secondary education, between and within the various sub-systems, is similarly dealt with in more detail below as indicative of a world-systems economic and geocultural influence on secondary schooling in Cuba. This influence clearly involved viewing specialisation and differentiation as a more efficient form of organisation in the economy, and hence corresponding hierarchical specialisation and differentiation in secondary school education as a more efficient means of producing the trained personnel required for national economic development. Sub-systems and their specialisations within the national education system would thus prepare the personnel for differential positions and occupations in economic life.

To this end, Ministerial Resolution 256/80 created the selective 'Preuniversity Vocational Institutes Specialising in Exact Sciences' (IPECEs) which, like the IPVCEs established in the 1970s, used national selective exams for entry, but specialised in Mathematics, Physics and Chemistry through expanded courses in these subjects, in addition to the normal preuniversity course load (see Fernández 1980b, p. 120). In this case, the new schools were presented as being "fundamental" for the scientific-technical development of the country (Fernández 1980b, p. 120). Ministerial Resolution 456/84 transformed a number of existing vocational schools into IPVCEs, based on this policy of preparing students to meet the current demands of the country's development plans, and the associated "more efficient use of available resources and better preparation of students" (Fernández 1985b, p. 125).

Reforms like this confirm the general emphasis on preparing labour through school education, evident in Rojas Fernández and Hernández Novo's (1985) description of the new schools as contributing to "solidly prepared" students "capable of carrying forward the accelerated development demanded by our society" (p. 33). In addition, however, as is evident in Fernández (1985b) comments, this process of differentiation amongst students for different types of educational training was presented as an efficiency measure, making better use of available human capital in the national economy. Hence, like the differential wages and labour hierarchies endorsed within and between industries and occupations, differentiation in schools was clearly intended to more efficiently integrate this level of labour preparation with the economy, and thus contribute to the achievement of economic development goals.

The policy of providing an elite style of upper secondary education in the IPVCEs, with highly competitive and selective entry, had been endorsed in the early 1970s in the context of the institutionalisation process. The Soviet influence and perspective on this policy is apparent in Kolésnikov's (1983) description of the schools as "the most perfect modification" of the basic school in the countryside model (p. 103). By the time of the Second Congress of the PCC some fourteen IPVCEs were functioning across the country, alongside other types of specialist secondary schools (Kolésnikov 1983, p. 293).

Within this general approach to differentiated school education for the efficient preparation of labour, 'Enrolment Commissions' were established for different sub-systems, often with separate entrance exams, on top of students' accumulated school record and other criteria. Quotas were established for the different sub-systems, and specialisations within them, for each municipality, in accordance with economic planning. Students in turn competed for places in the different sub-systems via municipal rankings, based largely on their academic performance.[123] Discussed in more

[123] As noted in the section on *National Political Objectives* above, students political-moral behaviour was also assessed by the entrance commissions, as provided in their accumulated student record, participation in political activities, family background, etc.

detail below, it should be stressed that the official rationale for this provision of differentiated forms of secondary education was based in notions of economic efficiency with respect to the training of human resources. Thus, for example, the Minister of Education expressed the need to:

> guarantee the rational utilisation of existing school educational resources and capacities for the training of the distinct specialists that correspond with the labour structure required by the country (Fernández 1978d, p. 111).

Thus while on one level this competitive specialisation contradicted the egalitarian principles of the Cuban Revolution and its socialist ideology, clearly in the post-1970 context of Soviet style hierarchies under the banner of efficiency and the 'socialist principle' of unequal remuneration, it was consistent with the national politics of the time. It was also consistent with the world-systems geocultural influence on the socialist development project, and the role of school education in this project.

Vocational formation and professional orientation

Documentation for the 1976-1985 period also shows consistent attention being given to the concept of promoting and developing students' 'vocational formation and professional orientation'. That is, the concept of generating student interest in specific vocations and occupations, and subsequently providing training and preparation for these. The structuring and reform of the technical and vocational sub-system was an integral part of this more general process, which was directed to the national system generally.

Inadequate vocational orientation was cited as one of the major causes for problems in secondary school education, including student dropouts or desertion, and bad attitudes towards study (see Piloto Diaz 1979, p. 53). Piloto Diaz (1979) went further, asserting that this insufficient orientation was a contributing factor to the identified poor quality of intermediate-level technicians and qualified workers emerging from the technical and vocational sub-system (p. 53). Hence, this general policy was closely linked to ongoing economic, and specifically labour, problems, the aim being to promote student interest in a specific occupational field earlier. This was intended to

develop in students a more substantial link and commitment to the occupation (vocational orientation), and prepare them with the necessary skills and work habits for their efficient transition from education into their vocation (vocational formation). The economic development basis of the process is well illustrated in Piloto Diaz' (1979) summary of the tasks of technical and vocational education, noting:

> to prepare qualified workers and intermediate-level technicians for the distinct service and production sectors that the planned development of society demands … [it] … must prepare capable youth with a love for work and for society (p. 52).

Piloto Diaz (1979) adds that this process of work formation and orientation included developing "correct work habits" (p. 53) in students, through programs of direct work experience and other activities that emulated actual work practice in the vocational field.

Vocational formation and professional orientation was in this way inextricably linked to the emphasis on the technical and vocational sub-system. The polytechnical schools and institutes were to increase their enrolments, and strengthen the vocational orientation and formation of their students, based always in their strategic social task of "providing for the economy of the country the trained, intermediate level, work force that it requires for the development of distinct production and service sectors" (Denis Domínguez and Melgares Reyes 1979, p. 39). The Second Congress of the PCC further affirmed and endorsed the concept of vocational orientation and training, via the technical and vocational sub-system, as a priority of the national system. Alongside Resolutions supporting increased enrolments in the sub-system, the PCC resolved to strengthen the:

> vocational formation and professional orientation of students, in accordance with their capacities, abilities and dexterity, in correspondence with the needs of economic and social development (Partido Comunista de Cuba 1981, p. 425).

Here too the endorsement of differential training and specialisation, intended to maximise the economic development benefits, is apparent.

A range of practices and initiatives accompanied these broader statements of intent. One example was directed towards orienting students towards the teaching profession through the systematic formation and use of *monitores* (teacher's aids) in all of the secondary sub-systems.[124] Ministerial Resolution 155/83 established a standardised program for these teacher's aids, including activities for their professional orientation. The Resolution outlined their selection in the second week of classes for each subject in each year level, and designated their roles and activities that included: giving classes or parts of classes; peer tutoring; helping to prepare teaching materials; and helping generally to promote Ministry of Education campaigns, like those promoting student attendance in extra-curricular "study houses" (*casas de estudio*) (Fernández 1983a, pp. 110-11).

Other measures included the implementation of a "propaganda plan" (*plan de divulgación*) under RM 35/82, using municipal and provincial educational offices to provide students with information that would assist them with their vocational formation and professional orientation (Fernández 1982c, pp. 106-107). The Minister's priority list for the 1982-83 school year similarly included a call for teachers to ensure that "all students are vocationally oriented" (Fernández 1982d, p. 13). Espinosa Santos (1981) adds that practical courses, such as "year projects" (*proyectos de grado*), were implemented within technical and vocational education so that students could develop their "ability and habits to apply acquired knowledge to technical problems of production" (p. 68). Additionally, the polytechnical centres were to collaborate with production centres in developing themes for potential projects that would "respond to the demands of science and technology and the fundamental questions confronted by these once incorporated into production" (p. 71). These followed the already strong emphasis on practical work within the polytechnical courses, with RM 656/76 for example establishing that some 60% of course time for *obreros calificados* and 30% for

[124] The term *monitor* translates literally as it appears into the English 'monitor'. Unlike the Australian term, however, in the Cuban context the students selected as *monitores* were encouraged to pursue a teaching career and assigned partial teaching duties and responsibilities. Hence I use the term 'teacher's aid' rather than monitor.

técnicos medios be for practical activities, with a 20 week "pre-professional practice in the final year" (Fernández 1977a, p. 62).

The inter-related aspects of these broad policy objectives and specific reforms is clear. Detailed, technical planning for national economic and social development, as a pre-requisite for building socialism, included using secondary school education to meet the labour requirements of the plans. Schools preparing skilled human capital ready and willing to work was thus linked to their socialist political objectives, in turn justifying student differentiation, under the socialist principle, for the different hierarchical positions in the national economy. Consistent emphases on increasing student numbers in technical and vocational training at the secondary school level, and improving their full preparation for a specific occupation, followed. Whilst this functional and selective approach to secondary school education brought contradictions with respect to the more radical, egalitarian politics of the 1960s, by the 1980s the approach was firmly entrenched and entirely consistent with the official socialist development project.

The national context of revolutionary Cuba was clearly different from that of capitalist countries in the world-system, and in this context the concept of work as part of the collective effort for the collective well being of society had more substance in Cuba than similar exhortations under capitalist regimes. Hence efforts to include students in the sub-system of technical and vocational education, so that they could more actively contribute to the process of socialist economic development, were undoubtedly driven in part by political principles (see RM 226/83 in Fernández 1984a). In general terms, however, the broad policy approach was similarly consistent with secondary school educational models and approaches across the capitalist world-system. Cuba's socialist political project was conditioned by the world-systems geocultural influence, promoting ideas of national development for sovereign nation-states based in scientific and technological advances. This influence had major implications for the role and organisation of secondary school education, providing basic skills and then vocational or academic specialisation. Such an approach can explain why Cuba's secondary schools increasingly extended these conventional characteristics in the 1976-1985 period.

SECONDARY SCHOOL DEVELOPMENT AND REFORM IN THE WORLD-SYSTEM

The changes made to the structure and functioning of the secondary systems, and the objectives and principles on which these changes were based, support a generalised continuity in educational development. In this sense, the changes made in the 1975-1985 period extended the trends already established. Political and economic development objectives continued to be identified as separate and combined goals. In line with the economic changes that began with the post-1970 reforms, and the shift towards valuing and differentially rewarding work output and technical or managerial expertise, attempts were apparently made to support this process through the more systematic selection and differentiation of secondary educational pathways. That is, a direct response in education to the new forms of economic organisation under the Soviet style institutionalisation, linking secondary schools to the planned numbers and hierarchical levels of labour required. This direct connection with national economic planning and organisation, was similarly shaped by the capitalist world-economy, its geoculture of development, and the associated assumptions related to economic efficiency and the role of school education in its achievement.

The reforms, policies and practices continued to be expressed in ways that were meaningful in the historical context of revolutionary Cuba. Thus the extended creation of elite, highly selective, preuniversity institutes that began in the early 1970s was presented in terms of the imperative need, under the socialist project, to identify and train those most capable of advancing the scientific and technological development of the country. The elite or technical vanguard would ensure that the technical-material base for socialism, and then communism, was achieved on the island. Political criteria in selection processes were similarly in line with the context of individuals serving the collective good by working hard and with consciousness in the field for which they were most capable. Efficiency was ‘socialist efficiency,’ specialisation and differentiation part of the socialist international division of labour for efficient, socialist development.

In the socialist political, economic, social and cultural context, policies were formulated and implemented, schools and their organising structures built and regulated, and until recently jobs found for all graduates of all types and sub-systems of education.

The national context was clearly of consequence, mediating the outcomes of these similar school education policies and practices to those found in non-socialist countries. The world-systems geocultural influence over the national economy of the island consistently pushed the educational response under the revolutionary leadership towards orthodox models of general and vocational education. This was based on the common geocultural assumption that this state provision of education was critical to the project of national economic development. This assumption continued into the 1970s and 1980s, and is well expressed in the World Bank policy paper of 1980, asserting that:

> Education has long been recognized as a central element in development. When the developing countries began their drive for social and economic development nearly three decades ago, education was perceived as a means not only of raising political and social consciousness, but also of increasing the number of skilled workers and raising the level of trained manpower (Kosichev) (World Bank 1980, p. 12).

The continued reliance on export commodities to finance domestic diversification, industrialisation and growth underlay the educational project. In turn, school education was directed to support economic planning, so as to maximise growth and development opportunities. Irrespective of their success, the intention and belief in the capacity of the general academic and vocational model to functionally allocate human resources, are critical signs of the world-systems geocultural influence.

This world-systems influence helps to explain how Cuba came to develop its fairly conventional model for national economic development, and school education to support development. This occurred, despite Fidel Castro's criticism of the underdevelopment and exploitation of Third World countries by the imperialist and core powers of the capitalist world-economy, through direct intervention and the consequences of fluctuating commodity prices and unequal exchange (Castro 1991). Even as Cuba pursued closer integration within the CMEA, the influence of the world market continued. The model of national development used within the socialist bloc held fundamental similarities with the world-economy in terms of: specialisation in an international division of labour, goals of increasing productivity and competitiveness, targeting export industries, pursuing import substitution; and general industrialisation

financed by the export of commodities. The priority of national economic development, and the national conditions and strategies for its achievement, were constrained by the capitalist world-economy. This in turn influenced the underlying principles and objectives of school education, and the options used for school organisation, structures and practices.

In a chapter on 'Education and Work,' the *World Bank Education Sector Policy Paper* of 1980 also noted the need to "improve the relationship between education and work," given the complex nature of the process that includes "questions about the formation of attitudes and habits characteristic of productive workers" (p. 43). The report noted two basic models used throughout the world the adapt education to the requirements of the economy: 1) to include practical (pre-vocational) subjects within lower secondary schooling; or 2) to have "a general academic stream, plus one or more specialized occupational streams, usually at the upper-secondary level" (World Bank 1980, pp. 44-45). The creation of separate technical and vocational schools, as sub-systems of the broader national system, were also recorded as a common response. The UNESCO (1971) *World Survey of Education* similarly noted that "the planning of educational development has also come to be emphasized … as a factor in economic growth and social development" (p. 22), with a major trend towards:

> providing junior secondary education of a general undifferentiated kind for all pupils, and postponing the time of selection or allocation to different types of secondary school or course till the beginning of the senior period (p. 36).

The broad similarities between these accounts of common (world-system level) models and that developed in Cuba are striking. The Cuban model was broken down into a number of sub-systems, providing a combination of a general, compulsory, comprehensive education to year 9, followed by specialisation within alternative sub-systems. The sub-systems established and entrenched in the 1970s were:

1. General polytechnical and labour education (including the compulsory six years primary and three years of basic secondary schooling, and the post-compulsory three years of (upper secondary) preuniversity);
2. Special education (parallel schools for students with disabilities / special needs);

3. Technical and vocational (primarily upper secondary level, through polytechnical schools and institutes providing specialised vocational training);
4. Teacher training and upgrading (primarily upper secondary and some tertiary level, in pedagogical schools and institutes, training new teachers and upgrading existing teachers' qualifications);
5. Adult education (parallel general polytechnical and labour education for adults); and
6. Higher (tertiary level) education.

Specialist schools of the arts, sports institutes, schools for military preparation, and the IPVCEs were contained within these sub-systems. After nine years of basic secondary (general polytechnical and labour) education, students could apply to enrol in the distinct institutions within the sub-systems, determining their academic or vocational path, and their specific specialisation within their general vocation.

The objective of the Cuban structure, in line with that outlined in the World Bank documents, is concisely stated in the MINED (1986) report to UNESCO. That is, to achieve "correspondence between planning for the development of the national system of education and the social and economic development of the country" (p. 12). The selection and allocation of students for the various sub-systems was to efficiently prepare human capital "in concordance with the interests of students and the necessities of the country" (p. 48). Article 20 of the Cuban Communist Party's (1984) *Code on Children and Youth* added that:

> School is the basic educational institution; its work contributes decisively to the communist formation of pupils, in accord with social progress, the advances in educational science and the needs of scientific-technical development (p. 14).

Hence the Cuban model borrowed, or shared many features of, world-systems models of both the broad objectives of state provided school education, and the basic, structural principles of general and specialised vocational or academic school education to realise these objectives.

In the analysis that follows five main features or categories of secondary school educational developments in the period are used to highlight the world-systems geocultural influence over secondary school education. In each particular policies and

related literature from within Cuba are cited to highlight the world-systems geocultural influence on Cuban educational thinking, structures and practices. Discussion of this identifies links to the world-system through the consistent and indirect imperative within the world-system to achieve national economic development; the broad alignment with the world-systems geocultural approach of using secondary schooling to prepare labour ready to apply science and technology for development; and the concurrence between specific secondary school policy statements, ideas, structures and initiatives in Cuba and those identified across the world-system.

Selective, hierarchical, specialised sub-systems

In discussing the technical and vocational sub-system of education above, I outlined the creation and extension of elite, selective, preuniversity vocational institutes (see Ministerial Resolutions 256/80 and 456/84 in Fernández 1980b; 1985b). This was part of a more general process of setting up systematic procedures and structures to regulate student entry into the various post-compulsory options. Under the new procedures established in RM 10/78, students accumulated school record, and their performance in centralised, academic examinations, was used to rank them in a list or scale (*escalafón*) based on their comparative scores at the school and municipal level.[125] This ranked list of students, on their completion of compulsory basic secondary education, was then used to offer students places in the post-compulsory options, based on their chosen preferences, their relative place in the *escalafón*, and quotas of places within each sub-system and their specific institutions allocated to each municipality (see RM 10/78 in Fernández 1978d, pp. 111-14).

Accompanying this municipal ranking system (*sistema escalafonario municipal*), the basic secondary schools established enrolment commissions to create the ranked lists using all of the evaluation criteria. Using constructed scales, they then allocated students

[125] The Spanish word, *escalafón*, translates literally as a scale or measure, in this case giving different point scores or grades to students. The result of this process was a ranked list of students, used to determine students eligibility to enrol (or apply to enrol) in particular sub-systems, according to their listed choices.

so as to "cover the places assigned for each type of centre and specialisation" (Fernández 1978d, p. 111). Thus a conventional method of comparing students at a municipal level was put into place, having them compete for places within distinct sub-systems and institutions that carried differential (hierarchical) entrance requirements, and hence differential social and economic status.[126] Students that had received national awards and / or recognition, such as the 'national vanguard' or 'provincial student emulation' awards, were automatically given their first choices and not subject to the normal selection processes.

As a part of this general, system wide process, particular institutions (by type and sub-system) established Enrolment Commissions to oversee the admission of students to them, often applying additional or special selection criteria on top of their established requirements for those seeking enrolment. Thus for example, Ministerial Resolution 192/78 established particular requirements for entry into the vocational military schools, run by Enrolment Commissions, that included an average academic record of 85 points, physical requirements, and family attitudes towards the Revolution (Fernández 1978e, p. 100). Similarly, Resolutions 232/78 and 47/79 established ranks and quotas for entrance into selective vocational schools (IPVCEs) direct from primary school, that included an average grade of 85 points (out of a possible 100 points, i.e 85%) and not repeating any of grades four, five or six (Fernández 1978g, p. 108; de los Santos 1979, pp. 115-17). Later, Ministerial Resolution 456/84 raised the entrance requirements to the IPVCEs to year 9 level, with an average grade of 88 points, and included the need to be a *monitor* or belong to a scientific-technical interest circle; be a vanguard of the Pioneer Student Organisation, have no physical impediments; and have a good political-moral and behaviour record (Fernández 1985b, pp. 125-26). In addition, Students that met these requirements were then subject to a specific entrance examination in

[126] The specific choices for students within the sub-systems described above included: vocational military and regular military schools; preuniversity institutes; polytechnical institutes and schools (agricultural; industrial; and economic and administration); pre-school teacher training schools (*escuelas de educadores de círculos infantiles*); physical education teacher training schools; schools for nurses, general auxiliary, pediatric and other technicians of public health; art schools; sports schools; merchant marine and ports schools; fishing industry schools; and educational centres attached to other state organisms (Fernández 1978d, pp. 113-114).

Mathematics and Spanish, needing a result of at least 70% to be accepted into these highly selective institutions.

This type of selection, and indeed the whole process of ranking and allocating students, was indicative of a world-systems geocultural influence. This is seen first in the assumption that these processes more efficiently prepared the required labour. This is an example of the world-systems geocultural concept of specialisation and differentiation contributing to efficiency and productivity. The UNESCO (1971) report, for example, cited the global trends of "formal scholastic examinations … nation-wide standardized tests of attainment … in conjunction with the school records of the pupils," in the process of selection and allocating students to the different types of senior secondary schooling (p. 36). Secondly, the world-systems influence is apparent in the idea that public education in the modern state involved this compromise between individual rights and obligations. This involved students' preferred pathways being restricted by the development requirements of the national development project. This is well seen, for example, in Ministerial Resolution 763/77, in which Fernández (1978c) emphasised that the universal right of students to free education at all levels, was conditioned by "their aptitudes, social demands and economic development needs" (Fernández 1978c, p. 121).

Assessment, control, and teaching methods

This system wide process of selection for schools and institutes within different sub-systems, extended the long established division between elite, academic preuniversity institutions and the polytechnical schools and institutes. The result in this period was that significant attention was given to the question of student assessment and exams, and the organisation of this so as to more efficiently move students through the various sub-systems. The reform of assessment practices within secondary institutions moved towards centralised and standardised, academic systems, to facilitate the subsequent use of the ranking systems and scales. There was also considerable attention given to the centralised monitoring and control of such procedures, to ensure policies and subject requirements were followed, and associated attention on teaching methods and school organisation to achieve the prescribed objectives. The expressed approach to such problems, particularly in this period of Soviet style socialist construction,

characteristically viewed teaching and learning as a technical science which, if adequately defined and regulated, would mechanistically realise the set objectives (see for example the approach set out in Partido Comunista de Cuba 1983; 1984).

With respect to student assessment and evaluation, RM 7/77 noted that state-wide, final exams would be used at the end of basic and upper secondary levels (Fernández 1977e, p. 100). In the same year the Minister impressed on teachers the need for the rigorous application of the established norms for student evaluation (Fernández 1977h, pp. 30-31). Resolution 255/78 affirmed that student assessment was an "essential component" of the education system in order determine the extent to which objectives had been met, and hence to raise the quality of students and the labour force (Fernández 1978h, p. 133). It established the system of academic evaluation for regular or common courses, using a standard scale of 0 to 100 points with grades of: "deficient" (0-59); "insufficient" (60-69); "good" (70-79); "very good" (80-89); and "excellent" (90-100),[127] this being critical for the process of student ranking. A mixture of ongoing "systematic" or "diagnostic" controls; "partial controls"; and "final exams" were mandated to arrive at the final grades.[128]

By the mid 1980s, RM 215/85 streamlined the assessment process, citing once again the importance of evaluation to measure the teaching-learning process, this being defined as students assimilation of knowledge and the development of their capabilities, abilities and habits (Fernández 1985c, p. 123). Systematic controls were removed from the process of formal assessment, to be more a part of teachers' continuous, diagnostic evaluation to assist their lesson preparation and planning. This left formal assessment to be done through two "Partial Controls" worth 25 points each; and one "Final Exam" worth 50 points, each semester (Fernández 1985c, p. 124). Whilst some subjects such as

[127] The Spanish terms for the grades in the scale were: *deficiente; insuficiente; bien; muy bien; and excelente*.

[128] To be eligible for promotion within secondary education a grade of 70 points (good) or better in each subject was required. The assessment tools of "systematic" and "partial" controls usually took the form of tests, though the nature of the continuous, "systematic" controls, was more open to alternative methods of student evaluation. Pressure to comply with centralised assessment and work norms, however, to arrive at the final score for a subject, lent itself towards the reliance on formal, standardised testing.

'Labour Education' or 'Technical Drawing' were excluded from the new norms, the increased reliance of formal, academic testing for students in school evaluation was firmly established. Discussing this Resolution, Antuñez Guerra et al. (1986) affirmed the importance of "Checking the knowledge, habits and abilities of students," and the need for precise objectives and instruments for their evaluation, hence support for the reliance on standardised academic testing (p. 112).[129]

With respect to teaching methods, signs of borrowing standard pedagogical approaches to school and classroom teaching and learning, as part of a world-systems geocultural influence, are also apparent in the literature. Thus for example an article in *Educación* by Carmen Manzano Anovega (1981) notes the centrality of the school, and in particular the 'class,' in students multilateral political, academic and vocational education. In the article, she describes the class as "the fundamental form for the organisation of the process of teaching-learning" (p. 83), adding that meeting the educational objectives depends in part of school inspectors who "check how the work is developed and orient towards the best methods" (p. 84). In another article exhorting the centrality of the "class" in educational work, Pita (1985) affirms that it was the place where students not only acquire knowledge, but "develop their capacity, abilities, habits and convictions as a series of character qualities that will allow them to work with tenacity, discipline, perseverance and rigour" (p. 4). That is, in a "planned, systematic and direct" way, the class was endorsed as the principal site for achieving the state's educational objectives, that were in turn expressed in terms of developing individual abilities and socialising students as good citizens and prepared workers.

In this way, conventional pedagogical aspects of teachers preparation, lesson planning, practice, and as noted above their assessment of student learning, were presented as the keys to meeting educational objectives. The world-systems geocultural influence was thus apparent in both the citizenship and development objectives, and the

[129] This process was not limited to the secondary level. RM 291/86 for example similarly de-emphasised the more subjective "systematic controls" from students formal assessment within the primary school (Fernández 1986b, pp. 127-128).

specific practice of teachers providing knowledge in classes to be acquired by students to meet these objectives. To this end Minister Fernánez (1982a) set out guidelines for teaching methods that allowed for greater teacher flexibility, in both planning and teaching practice, responding to internal criticism of excessive rigidity and a lack of quality teaching (see for example García Ojeda 1986, pp. 27-28). Here again the general character of this type of reform shows a world-systems influence, in the concept of the flexible, individual teacher, based on their professional training and experience, simultaneously meeting prescribed objectives and catering for individual differences.

Further illustrative of this orthodox pedagogical approach to teaching, Vega Camaros, Carrasco Espinach and Perez Alvarez (1982) emphasised the importance of teacher preparation for classes, focusing on the selection of content, teaching materials, and teaching methods to improve student acquisition of the content knowledge (p. 16). Ministerial Resolution 37/83 contributed to the process of rationalisation or streamlining of school education by removing excessive content from the Mathematics curriculum, and working with the Central Institute of Pedagogical Sciences (ICCP) to monitor and regulate the new content in upper secondary schools (Fernández 1983a, p. 107). The technical or instrumental nature of the reforms to achieve orthodox pedagogical and development objectives adds to the world-systems influence.

Finally, a number of articles appeared in this period outlining specific aspects of the work of executive teaching personnel and ways to improve their work, as well as further discussion of the role of school and class inspections as a technical means of ensuring compliance with policies and improving outcomes. Thus for example, Lovelles (1982) discussed the role of head teachers, to "direct, evaluate, orient [and] control" all teaching activities in their discipline (p. 7), and particularly provide support for new teachers with teaching and assessment methods (pp. 10-11). Jiminez Gonzalez (1982) outlined the roles of the Principal in basic secondary schools, going so far as to provide a detailed daily plan, covering an entire month, for a Principal of an ESBEC (pp. 45-51). Pérez Marrero, Diaz Rodríguez and Pérez Fernández (1985) deal with the tasks of "Teacher Guides," to oversee and assist with students multilateral formation (pp. 64-76).

In summary, a conditioning world-systems geocultural influence can be seen within this emphasis on assessment, teaching methods, and school organisation and control. This is evident in the policy of standardised comparison of students to assist in their selection and allocation to differential career paths and sectors, in the interests of functional efficiency to maximise economic development. Attention to the regulation of teachers planning, teaching methods and assessment (and other) activities, was accompanied by guidelines to improve these so as to fulfil measurable objectives like promotion rates and the efficient allocation of students to the various sub-systems and specialisations. This can similarly be seen as evidence of a world-systems influence. These processes in Cuba emerge as evidence of the broad world-systems geocultural influence over the national economy; the objectives of economic development and state building; and the whole concept of school education contributing to this by socialising members of the socialist state, with skills and attitudes corresponding to the labour requirements of the national economy. That is, the role of the school efficiently contributing to the development project.

Faith in maths, science and technology

A key feature of the world-systems geocultural influence on nation-states is the shared belief or faith in the ability of science and technology, once rationally harnessed and applied, to bring social and economic progress and development. This aspect is repeatedly demonstrated in the Cuban (and Soviet) approach outlined. That is, within the concept of constructing the material and technical base for socialism which, with the ongoing scientific and technological revolutions, would facilitate the construction of communism.

Ministerial Resolution 466/81, for example, put this world-systems concept of science and technology led national development and progress into specific educational practice, by emphasising the teaching of Mathematics, Physics and Chemistry, and the upgrading of existing teachers' knowledge and skills in these subjects (pp. 111-14). Centralised courses were thus set up for existing secondary teachers, in line with the emphasis identified in the previous chapter on Mathematics and the Sciences (including Geography, Biology, Physics and Chemistry) in the reformed core curriculum under *perfeccionamiento*. This trend was further developed with RM 289/82 which

generalised a policy of providing "complementary practical programs in the subjects of Maths, Physics and Chemistry in 12th grade" (Fernández 1982b, p. 120), in the form of three hours of extra classes each week. This came on top of the creation of the elite IPECEs with additional courses in Maths and the Sciences, and the promotion of the technical and vocational post-compulsory sub-system. The influence of this world-systems geocultural concept over secondary schooling in Cuba was strong.

Here too the UNESCO (1971) report provides some useful context, with much on the two decades of "technological revolution" and the potential of these scientific advances to provide better material and life conditions for all. Within this context of the scientific and technical revolution, and associated social progress, the report noted a resulting emphasis in nation-states on:

> the development of persons whose intelligence and adaptability fit them to participate in an economy more complex and more demanding of the rapid acquisition of new skills and new attitudes than that of any preceding era in human history (p. 14).

The scientific advance was generalised, with the emphasis thus falling on national systems ability to maximise the benefits of this in their specific contexts. Again, the Cuban model and practice is consistent with the world-systems model, with formal policy focused on preparing highly skilled and flexible workers and technicians, and an elite trained in the most recent scientific and technological advances.

Training new (qualified) professionals

Fitzgerald (1990) has characterised the political and educational changes in the 1970s and 1980s in terms of a shift from 'old cadres' to 'new professionals'. That is, a new or heightened emphasis on formal training and technical expertise, identified by formal educational credentials, thus de-emphasising the value of (revolutionary) political credentials in the labour force. In line with this thesis, systematic, rationally and scientifically planned, technical training and preparation was repeatedly endorsed as the key to providing the personnel capable of directing and managing the advances of the scientific and technical revolution and their application for accelerated, national economic development. As noted above, politics maintained a place in the official

program, but was often defined in terms of the more functional economic objectives, and potentially reduced to passive participation in official political activities and the uncritical expression of the official Party line (see Martínez Heredia 1995a; 1995b).

Support for higher levels of formal and technical qualifications can be seen as linked to the world-systems geocultural influence, via the belief in progress and development through the application of science and technology. Thus for example, RM 656/77 on the reform of the technical and vocational sub-system affirmed that the change was necessary to "guarantee that the professional preparation … [of personnel] … corresponds with the advances of the Scientific-Technical Revolution" (Fernández 1977a, p. 55). In a world-systems context of social and economic development being tied to such advances, and their application to nature and society, making formally trained and credentialled technical expertise a priority logically followed. Again this extended the long standing influence in Cuba, evident for example in Figueras's (1965) call for such qualified personnel in equivalent proportions to those in developed countries.

The push for qualified professionals was particularly strong within the teaching profession itself, given the historical context of teacher shortages, the extensive early use of volunteer teachers, and the continued use of a range of innovative 'emergency' or rapid teacher training programs. Within this area two main trends emerged. First, the structure and requirements for entry into teacher training programs were gradually lifted, and secondly extensive efforts were made to re-train and upgrade existing teachers qualifications. Ministerial Resolution 658/76 thus noted that the process of *perfeccionamiento* demanded higher levels of teachers' "political, scientific-ideological, and technical-pedagogical formation," and hence integrated all teacher training programs under the 'General Direction of Teaching Personnel Training and Re-training' (*Dirección General de Formación y Perfeccionamiento de Personal Pedagógico*) (Fernández 1977b, pp. 100-101). The content, curricula and texts of teacher training courses were to be revised by the new commission, with attention to general political-social, psychological-pedagogical, general teacher training and specialist subjects for specific disciplines (p. 107).

Following this, RM 369/77 established the 'Preparatory Course for the Degree in Primary Education' to upgrade the qualifications of existing teachers and other personnel (Fernández 1977f). Ministerial Resolution 643/77 similarly announced a new program to upgrade language teachers' qualifications to the degree status (see Fernández 1978a), whilst RM 597/81 instituted special two year courses for Principals and deputy-Principals of schools in the general, polytechnical and labour education sub-system, targeting their knowledge of pedagogy, psychology, administration and the scientific management of school work and organisation (Fernández 1981b, pp. 113-15).

Other specific measures were directed to the use and regulation of the Pedagogical Brigades. Problems with this method of teacher training, itself a response to the drastic shortages of basic secondary teachers as enrolments in this sector expanded, were acknowledged in RM 391/77 in terms of the student-teachers failing subjects in their study but continuing to work as teachers (Fernández 1977g, p. 116). The resolution put an end to this practice, and called for greater MINED control over the progress and use of these student-teachers. By 1984 the Minister resolved to lift the level of entry into the Pedagogical Brigades from basic secondary (year 9) to preuniversity (year 12) level, along with other, more stringent requirements such as: an average grade of at least 87 points; no subjects repeated in preuniversity; and a preparedness to "serve the Revolution in any part of the national territory or in any other country" (Fernández 1985d, p. 126). Special "interview sub-commissions" were also set up to "verify [students'] requirements for enrolment" in the Brigades (p. 127).

This was a part of the underlying push for new professionals, that had seen a gradual lifting of both the entrance requirements for teacher training programs and the length (and level) of the programs themselves. Thus by the mid-1980s Primary Teachers were selected from basic secondary graduates to enter four year courses in pedagogical schools, whilst the major avenue for training secondary teachers was through five year courses in the 'Higher Pedagogical Institutes' (*Institutos Superiores Pedagógicos*), with

entrants selected from preuniversity (year 12) graduates (see MINED 1986, pp. 29-30).[130]

Within this specific example of teacher training, and the broader push for increased levels of formal educational qualifications, the influence of the world-systems geoculture is evident. That is, the idea of an sector of highly trained experts or professionals overseeing and guiding the national development project, with individuals assigned to differential positions to maximise the efficiency of the development process. The focus on teachers clearly suggested that in order for the broader process to work, their levels of professional training needed to be raised and constantly upgraded, enabling them to prepare the personnel required by the nation. The UNESCO (1971) review noted a "general tendency towards a lengthening of the period of schooling, made necessary by the technological changes taking place in societies at all stages of development" (p. 29). This world-system level trend was heightened in Cuba by the development imperative, and shared belief in the role of formal education and training to contribute to the development project required to overcome underdevelopment and achieve socialism.

Education for citizens of the (developing) socialist state

Aspects of a world culture of world polity approach to explaining school education, with the school socialising members of the modern nation-state, emerges as a strong part of the broad world-systems geocultural influence. This involved socialising national citizens that recognised and supported the legitimacy of the state, and the national plans of the state institutions. In the case of Cuba, this also involved forming citizens that recognised certain norms of behaviour within the socialist state and its political project. In this way Ramirez and Boli (1987), for example, acknowledge the link between education and "the world polity's myth of progress" (p. 155), and the

[130] By the 1990s both primary and secondary teacher training courses required year 12 or its equivalent for entry, in addition to tests in Maths and Spanish and interviews to assess students' aptitude and aspiration for the profession (in Varela Hernández et al. 1995, pp. 91-94). All teacher training was thus lifted to Degree status in tertiary or higher education institutions.

associated ideas, accepted by governments throughout the world-system, that "education has been a key factor in national development" (p. 156). Cuba is no exception to this process. The evidence shows that in revolutionary Cuba in this period, the socialising aspect of secondary school education continued to be seen as one of its most fundamental roles. That is, preparing citizens in their rights and obligations under the Revolution and its socialist objectives, including skills and attitudes to contribute to the national development project.

While the Cuban schools fit the world culture approach of creating members of the state, the socialisation of these members or citizens was marked by the influence of the capitalist world-economy and its geoculture of development. Thus, for example, the new socialist citizens were to accept the possibility, even the inevitability, of national economic and social development for the sovereign state, under the socialist program. In exercising their right to school education, they were to learn to accept their obligation to train in the areas of most need by the state, and subsequently apply their acquired knowledge and skills to their work and the development project. In this way, the geoculture of development permeates the identified features of a world culture or polity shaping national education in Cuba.

With respect to national specific forms of this intended socialisation in this period, attention was placed on students' "formal education," after the issue had been raised by Fidel. Schools and teachers were thus directed to give greater attention to students daily behaviour or conduct with respect to a range of prescribed social norms. An extensive 'Manual of Formal Education' appeared in the journal *Educación*, with a detailed listing of desirable behaviours ranging from study and work habits to students appearance, use of language, attitude towards teachers, and eating habits (see MINED 1977a; 1977b).[131] Lopez Padron (1984) later endorsed this focus as a part of inculcating in students a consciousness of their "social obligations … [and] … the need to learn in order to be

[131] The lists and directions were thorough in their detail, calling for example for specific norms of courtesy from male students towards teachers and female students, and for all students to use the "correct posture" when seated and adopt norms of "urbanity" at all times (MINED 1977a, pp. 36-39). Lopez Padron (1984) also cited norms for appearance, including hairstyles and dress codes (p. 59).

more useful for society and the revolution…" (p. 56). This required discipline was to be fostered through socialising students in a range of social, behavioural norms.

Calleja Guerra and Silvia Lopez (1981) listed teaching methods directed towards achieving student respect for teachers, and strategies for behaviour management and discipline in the classroom (pp. 33-35). Further along this line, 'Special Schools for Students with Behavioural Problems' (*Escuelas para la Educación de Alumnos con Trastornos de la Conducta*) had been established for the more extreme cases of student behaviour and attitudes contrary to the desired qualities of the new citizens. The schools ran parallel curricula to that of general, polytechnical and labour education, along with "re-educative techniques" to overcome students behavioural problems, aimed at their ultimate re-integration into mainstream institutions and society (see Ortega Rodríguez et al. 1982, p. 1).

Examples like these provide evidence of very specific, behavioural and socialisation goals pursued through schools in Cuba. The conservative influence of the Soviet Union was particularly apparent in this period, with respect to intolerance of any supposed indicators of 'ideological diversionism' or bourgeois tendencies, including musical tastes and personal dress styles and appearance of the youth. It also extended into discrimination against homosexuality, HIV-AIDS, and ongoing gender based inequality (see Leiner 1994; Smith and Padula 1996). These specific details can be seen as conditioned by the world-systems geocultural influence, given their general character of socialising citizens to live and work in the political and socioeconomic framework of the socialist state. The objectives of at least passive support for the state and its programs and institutions, through this attention to students behaviour and its modification, emerge as linked to the world-systems influence of school education, socialising state citizens required for national development plans.

CONCLUSION

This chapter covers a long period in the history of the Cuban Revolution, characterised by ongoing attempts to institutionalise a model of socialist political and economic organisation, based on the Soviet experience, that would maximise the

possibilities of realising national social and economic development. That is, the creation of state structures, institutions and procedures for the long term, stable, political and economic administration of the country. The first two, full five-year plans for the economic and social development of the nation were covered, along with the associated extension of formal structures for public participation in the workplace and political and social life. The uneven economic growth experienced under these plans was outlined, within the framework of this being conditioned by the capitalist world-economy, and the participation of Cuba and its program for national development within this world-system.

Citing a range of primary and secondary sources, these events were characterised as extending the market forms and policies begun under the process of institutionalisation. They included the entrenchment of wage differentials based on occupational status and work output under the 'socialist principle,' opportunities for self-employment, and the trading of limited goods and services using market mechanisms of supply and demand. I argued that this continuation of policy further entrenched the concept of a technical or professional elite, and other sections of the differentiated labour force, being required to efficiently manage the administration and implementation of government policy. National policies remained focused on maximising national economic development, articulated and presented in specific, meaningful ways in the context of the revolutionary, socialist development project.

With respect to the development of secondary school education, general continuity in policy is the defining characteristic, in terms of the main, underlying objectives, with specific policies and emphases put into place extending these. Thus, for example, the expansion of selective upper secondary schools, the emphasis on students' vocational orientation and preparation for work, and the assessment procedures to allocate students to the differential, post-compulsory options, were all built on the objectives of secondary school education supporting the process and state strategies for national economic development. Specific features were incorporated into policy via the influence of the Soviet Union, and particular national, revolutionary context, such as the principle of work-study, or the model of schools in the countryside and attempts to universalise these. Within these nationally specific policies, however, the world-systems

geocultural influence was identified in the underlying premises or objectives of the policies, and the constraints of underdevelopment within the world-system.

The major contribution of this chapter is its identification and description of this general continuity in basic secondary school education policy, and the ways the world-systems influence shaped this to promote the basic model, structures and practice of the schools. In this respect, the chapter outlined:

1. continued attempts to use school education to achieve political objectives, involving the political formation and socialisation of the youth for their full participation in the socialist project, recognising and exercising their rights and obligations in the socialist state;
2. interrelated, ongoing attempts to prepare students for work in secondary school, providing and promoting required skills, attitudes, values and behaviour in students (these in turn constituting the political project and increasingly shaping the expression and definition of the political objectives);
3. the extension of a differential, specialised structure in secondary schools, premised on its efficient preparation of the specialised labour required to achieve the development objectives; and
4. the world-systems geocultural influence over this whole process, shaping the basic orientation of secondary school objectives and the models of schooling established to achieve them.

Secondary schooling in this period responded to the increasingly segmented labour force, differentiating future workers, technicians and experts according to their school educational qualification and pathway. In this context, the communist formation of students was increasingly expressed as a part of their successful preparation for and integration into the labour force, in the sector and position required by state plans.

This attention to the structures of post-compulsory secondary education, and the practices involved, strengthens the argument for a world-systems geocultural influence, already apparent in the basic objectives, structures and premises of secondary school education. The systematic reform and structuring of separate sub-systems for academic, technical and vocational, or teacher training, with a general emphasis on promoting the professional orientation of all students towards particular occupational specialisation in school, was clearly linked to world-systems assumptions about the organisation and objectives of secondary school education. Similar models combining basic, common training with academic or vocational specialisation were prevalent throughout the

world, and particularly so in the Soviet Union. The methods of assessment for comparing, ranking and selecting students for the sub-systems followed, as did more general attention to teaching methods within the orthodox institutional structures to better achieve the sought after vocational (and political) formation. The main trends in the national development of the system, that is political and economic development objectives, connect with the world-systems geocultural influences of socialising loyal citizens for the state, prepared to work for national social and economic development goals.

Problems were encountered within Cuba in achieving the expressed goals. Thus for example indications of problems in students' political formation were periodically referred to by the Cuban leadership and figures in the Ministry of Education (see for example Sus Pompa, Menéndez Blanco, and Bernal González 1986). Problems of student cheating in exams, teachers over preparing students for exams to maximise promotion rates, and indiscipline in work-study, to name a few, emerged and were increasingly acknowledged into the latter part of the 1980s. The hierarchical nature of the system, with competition for high status levels and types of schooling, may well have provided incentives for academic fraud, the uncritical or passive reproduction of official Party politics, and indeed aspects of student resistance to the demands of the system. These problems highlight the contradictory dynamic between some of the specific socialist political objectives of schooling in revolutionary Cuba, and the world-systems conditioned model of schooling established. As is described in more detail in the following chapter, such problems further support the world-systems approach for explaining the model of secondary schooling developed in revolutionary Cuba.

Chapter V:
From rectification to the 'special period,' 1986-1991: The persistence of liberalism

The basic goal is to train new generations of revolutionaries, educated about work and for work, with strong technical and cultural training and profound political and patriotic convictions.

- PCC Resolution of PCC Program , IV Congress of PCC, 1991 (in Reed 1992)

INTRODUCTION:

The 1986-1991 period began with the expressed domestic policy shift away from the market style economic reforms of the SDPE, established under the Soviet influenced process of institutionalisation. The ensuing campaign to 'rectify errors and negative tendencies' (hereafter rectification campaign), criticised the mechanical copying of Soviet models, institutions and mechanisms, but at the same time distinguished itself from the political and economic reforms in the Soviet Union and Eastern Bloc. The rectification campaign was driven in part by politics-ideology, but also by the deteriorating domestic economic situation, foreign debt crisis, and need for domestic austerity, which the ideological exhortations helped to implement and justify. Moral incentives were promoted, free-market activity restricted, and intermediate level corruption targeted from above. As some limited signs of domestic economic recovery began to appear, the dramatic changes to world conditions began to emerge. The international socialist states, and critically the CMEA, began to break down first in Eastern Europe, and then in the Soviet Union itself. By 1989 Fidel was foreshadowing the worst possible scenario of Cuba's political and economic isolation, something that the island faced by 1991.[132]

[132] Efforts to overcome this isolation, establishing and extending diplomatic and trade relations with countries across the world, have been constant features of Cuba's strategy since 1991 (see for example Lage 1995; Carranza-Valdéz, Gutiérrez Urdaneta, and Monreal-González 1995; Figueras 1994).

These changes, and their massive implications for the national political economy of the island, provoked the 'special period in peacetime,' and clearly forced the whole-scale revision of policies, institutions and strategies on the island. For the purposes of this research, however, the focus is on the period and events leading up to the collapse of international socialism. That is, the period of overt socialist renewal in Cuba, up to the point of the collapse of the Soviet Union, CMEA, and emergency response for economic survival on the island. This marks the end point of the historical study of school education in Cuba. This major shift in world conditions altered the world-system in such a way that revolutionary Cuba was forced to more actively pursue closer integration in the capitalist world-economy than ever before. While the world-systems geocultural influence on school education continued, the new conditions made the prospect for a radical, alternative model of school education no more likely that in any other state in the capitalist world-system.

Secondary school educational policy made some response to the domestic events over 1986-1991, most notably in terms of an increased emphasis on patriotism as political and economic isolation, coupled with major problems, emerged. In line with the critique of bureaucratic inefficiency and workers' insufficient fulfilment of their responsibilities, an emphasis on streamlining curriculum content and improving the "quality" of teachers' work also emerged. Economic austerity and the continued push for efficiency brought increased calls for multi-skilling (*multioficio*), and ongoing improvements in the preparation of students for life and work. Trends related to the national political economy were extended, with the political formation of students being cast in terms of their patriotism and preparation for work. This was in line with the fundamental approach of secondary school education being articulated with plans for national social and economic development.

The dominant feature of secondary school education in this final period of analysis remains continuity, rather than change, responding to and articulated in the national political economy, and conditioned by the world-systems geoculture of development. The world-system continued to shape the national political economy, influencing foreign debt and trade, and domestic economic priorities. These in turn contributed to policy emphases in education, as they had throughout the Revolution, seeking to

produce skilled and efficient, disciplined workers. The core curriculum for basic knowledge and skills was streamlined, and the policy of post-compulsory selective specialisation further entrenched, based in meritocratic ideology, in line dominant models of secondary school education across the world-system. Further refinements to the system of student assessment were made, with a more centralised and standardised system established. As part of the process of selective, specialised, upper secondary training, this was again in line with global conceptions of improving standards through more rigorous evaluation. The central objectives of school education thus continued to centre on the preparation of loyal, patriotic citizens prepared for social life within the national polity, and to work efficiently in their meritocratically determined position within the occupational hierarchy of the national economy. As demonstrated in previous chapters, these features were not new. They provide evidence for continuity in the development of secondary school education, linked to the conditioning world-systems geocultural influence.

That this broad continuity remains amidst significant national political, economic and social change, adds weight to the argument to look beyond national conditions and policy formulations for influences on educational development. Having traced this general continuity of secondary school education through the crises and changing conditions and orientations of some twenty-five years of Revolution, from the radical idealism of the 1960s through the Soviet styled reconstruction and institutionalisation of the 1970s and 1980s, there is little reason to expect a radical change in the late 1980s. World-system level influences are apparent in the primary objectives, philosophy, structures and general organisation and practice of secondary school education, setting the context within which specifically national policies and practices were articulated.

The approach developed in this research leads to a structure in which the world-system emerges as the starting point for understanding and explaining developments in secondary school education in revolutionary Cuba. A central argument of the world-systems approach is precisely that the world-system, rather than particular nation-states, constitutes the most meaningful unit of analysis in the historical social sciences. The logical inference for analysing phenomenon within national boundaries, is that a more meaningful approach to explaining events in revolutionary Cuba is to set these events in

the context of the world-system. This study of national school education in Cuba has sought to strengthen this approach, by highlighting its explanatory value in the case of revolutionary Cuba. That is, the conditioning impact of the world-systems geocultural influence, explaining why the system of secondary schooling in Cuba resembled dominant or orthodox models found throughout the world.

Previous chapters have set out the national context, reviewed formal educational policy and practice related to national political and economic objectives, and then synthesised the historical evidence in this development of a world-systems geocultural influence conditioning secondary school education policy, structure and practice. To emphasise and better reflect the world-systems approach to school education developed and advanced in this research, the structure of this chapter differs slightly. The general context of the national political economy, linked and repeatedly responding to world-system conditions, is set out first to characterise the national context within which school education policy and reform took place, relating the national socioeconomic conditions to the world-system. This is followed by the review of identified problems in secondary school education within the rectification campaign. These problems, and the policy statements and responses, are subsequently explained by the world-systems geocultural approach. In this way, the development of policy and reforms in the period is categorised according to the world-systems influence identified in their content. Problems in secondary school education are linked to the orthodox structures and practices, which are in turn linked to the world-systems influence.

The approach taken to, and structure of, the analysis in this chapter is the culmination of the research to this point. That is, it embodies the shift from citing evidence of world-systems influences, to viewing this level of influence as the broad framework within which analysis of national events, policies and actions is made. In the case of revolutionary Cuba, this framework explains the school educational response of:

1. shared world-systems geocultural and economic conceptions in governmental objectives of social and economic development, and related views on the function of school education in this project;
2. related and shared world-systems geocultural conceptions about the role of school education socialising loyal citizens; and

3. policy responses within these world-systems norms and constraints, presented and implemented in nationally distinctive, legitimating and meaningful ways.

The starting point in the educational analysis is, therefore, the conditioning influence of the world-economy and world-systems geoculture of development, shared by Cuba's socialist, Marxist-Leninist project.

THE NATIONAL CONTEXT: PROBLEMS, RECTIFICATION, RECOVERY AND IMPENDING CRISIS

By 1986 the domestic political economy again faced major problems, linked to the external economic relations, and internally to the SDPE's reliance on market mechanisms and the resultant economic inequality and political contradictions. The combination of these provoked the centrally led campaign to 'rectify errors and negative tendencies'. World market conditions were again predominant, exacerbating the island's substantial and growing hard currency debt as prices for sugar exports and oil re-exports fell. The need to strictly limit hard currency imports, and promote increased and more efficient production of hard currency exports, combined with a series of problems in the domestic investment process. The emphasis on measuring economic performance under the SDPE in terms of value, rather than project completion, had overstated the positive performance of the 1980s. The domestic problems were exacerbated by ongoing labour indiscipline, tied to inefficient or unrealistic work norms, and expectations of increased consumption that had developed over the 1980s. Hence the increased inequality under the reforms of the late 1970s and early 1980s made any call for austerity from the majority, to resolve the domestic and external economic problems, politically problematic. The politics of socialist renewal under the rectification campaign, with a formal attack on corruption and privilege, was implemented to manage the process.

A slight improvement in the domestic economic performance, or at least a slowing of the deterioration, emerged post-1987, largely in respect to the more efficient use of resources, and the external trade balance through the reduction of imports and program of domestic austerity. Regardless of whether the rectification campaign was responsible for improved economic performance, by 1989-90 political problems with the Eastern European members of the socialist bloc began to have disastrous consequences for the socialist community, whilst signs of serious problems within the Soviet Union itself had

emerged. The prospect of all trade within the rapidly declining CMEA being in hard currency became a reality at its fifty-fourth meeting held in January 1990, as the onset of delays and the non-arrival of crucial Soviet imports began to be felt (see Mesa-Lago 1993b, pp. 154-57). Any recovery was short lived, and the island moved into the beginnings of the emergency situation of the 'special period in peacetime,' in which old formulas for planned aid, development and growth within the Soviet led socialist community no longer applied. The national economy moved into its "worst crisis under the revolution" by 1991 (Mesa-Lago 1993b, p. 176), with the formal dissolution of the CMEA, the fast diminishing and uncertain trade with the collapsing Soviet Union conducted in hard currency, and the associated paralysing of national industry and massive reduction of the country's purchasing power.

A review of the national economic performance, and the shift into major crisis with the collapse of international socialism, serves to highlight the persistent conditioning or constraining role of the world-system over the national political economy. This occurred primarily through world markets and export commodity prices, hard currency imports and foreign debt interest rates and repayments, all with significant implications for the domestic policies and performance. A review of the rectification campaign preceeds this, however, given that it was officially launched in 1986, and constituted a critical part of the national sociopolitical and economic context. This also sets the context for world-systems influences shaping national responses, and highlights the ways in which national revolutionary politics informed and were used to legitimise, the subsequent responses to world and national conditions. Again, with reference to the analysis of secondary school education in this period, the rectification campaign strengthens the case for a world-systems geocultural influence conditioning school educational thinking, structures and policies, with revolutionary politics being used to legitimise school reforms and objectives, linked directly to the general project and specific strategies for economic development.

The rectification of errors and negative tendencies

The result of the domestic economic and political problems was the rectification campaign, launched by Fidel in 1986. There is a broad consensus in the literature from outside Cuba that the rectification campaign was driven primarily by the economic

situation of the island, with the national historical and political context influencing the specific character and shape of the response (see for example Eckstein 1994; Pérez-Stable 1993a; Petras and Morley 1992; Azicri 1992). Thus whilst the rectification campaign was largely an attempt to address national economic problems linked to the world-economy, politics and ideology were also consequential factors in shaping the responses made in the campaign. As expressed by Eckstein (1994), "*Within* the context of economic constraints, ideology and political considerations shaped the strategy the state selected" (p. 87).

Within Cuba, the process was presented largely in political-ideological terms. This pragmatic use of politics, casting the reforms within the continuum of the revolutionary process, helped to justify unpopular measures designed to improve the island's foreign debt and trade, such as reducing domestic consumption and restricting imports. In turn, the revolutionary rhetoric helped to manage any potential opposition to the domestic austerity program (see especially Eckstein 1994, pp. 60-87; Petras and Morley 1992). Thus the public emphasis was consistently on political consciousness, voluntary work, and the radical egalitarianism of the 1960s (see the collection of Fidel's speeches on the Rectification process in Castro 1988), whilst calls for harder and more efficient work were articulated as calls for heightened political awareness or consciousness. Beneath the rhetoric, however, the economic imperatives were pursued in a range of reforms and policies, many arguably contradicting the appeals to socialist politics, thus underlining the influence of the national and world-economy, rather than national revolutionary politics, on this reform program.

Bengelsdorf (1994) outlines the Cuban perspective on the rectification campaign, in which it emerged in the early 1980s, before *perestroika* and *glasnost* in the Soviet Union, as a specific response to "specifically Cuban needs and problems" (p. 142). Under the Cuban interpretation, the process began with the U.S. invasion of Grenada in 1983, the absence of a Soviet response leading to the consideration of the implications for Cuba, and the subsequent mobilisation of popular militias. The process progressed to a critique of the 1970s and 1980s, and particularly of the "borrowed institutions, ideology, and methods of procedure" (p. 143). Thus changes were made as early as 1984, with the creation of the *Grupo Central* to oversee yearly economic plans, and the

later removal of Humberto Pérez as head of JUCEPLAN. The dismissal of Politburo member and secretary of ideology Antonio Pérez in December 1985, again prior to the official launch of the rectification campaign, adds weight to the thesis that some significant domestic political and economic reform was under way prior to Fidel's formal announcement of the campaign on April 19, 1986.[133]

The official Cuban perspective of the rectification campaign stressed revolutionary politics, and the "the live, consequential and revolutionary application of the ideas of Marxism-Leninism" (Castro 1988, p. 137). This can be seen in the numerous speeches by Fidel criticising the negative ideological tendencies that the "errors" of particular policies, in the late 1970s and early 1980s, had brought to the island (Castro 1988). Such tendencies identified by Castro (1988) included: enterprise managers "playing with capitalism" (p. 3); "demagogic practices" of bureaucrats and administrators (p. 31); unethical profits being made by intermediaries in the Free Farmers Markets and housing industry (p. 55); excessive faith in economic mechanisms to organise work and production under the SDPE (p. 135); and the conversion of political-ideological activities into bureaucratic and superficial exercises (p. 198). Strong measures ensued that affirmed the political-ideological character of the rectification campaign, and its rejection of capitalist methods. These included the closure of the Free Farmers Markets in May of 1986; greater restrictions and taxes on the self-employed; an attack on private housing construction; and the top down attack on corrupt managers, bureaucrats and administrators (Castro 1988, pp. 7 & 31; Mesa-Lago 1988, pp. 84-86; Rodríguez García 1990, pp. 260-61).

A more critical evaluation of the Rectification goes beyond the official position, to the pragmatic value of the popular appeal to revolutionary values and an attack on intermediate level bureaucratic corruption, in the context of worsening world-economic conditions and impending national economic contraction. To this end Azicri (1992), for example, notes "With the consumer facing increased shortages, the need to deemphasize

[133] Symbolically, this speech on April 19 marked the twenty-fifth anniversary of the Bay of Pigs invasion in 1961, after which Fidel had publicly announced the socialist character of the Cuban Revolution.

material consumption and to entice the population effectively to embrace revolutionary consciousness remains as strong as ever" (p. 43). In stronger terms, Petras and Morley (1992) argue that the whole campaign was the result of a "major internal policy debate over how best to confront Cuba's economic stagnation and its hard currency balance-of-payments problem" (p. 16). They add that the campaign from above against:

> …some of the commonly disliked features of Cuban socialism – corruption, managerial abuses, private appropriations of public transport, and the like … preempted any campaign from below against the restrictive economic measures imposed by the regime (such as increases in prices, reductions in salaries, and increased costs for utilities and transport) (p. 23).

Such assessments indicate underlying continuity in economic policy, with certain capitalist type reforms actually extended in this context of communist political-ideological renewal (Petras and Morley 1992; Eckstein 1994; Rabkin 1988). Thus for example, Eckstein (1994) notes that ideology was used by the government to "help legitimate policies that it had material reasons to implement, policies that would have been politically risky to implement if not ideologically justified" (pp. 60-61).

Hence alongside the moves to renew revolutionary commitment, and address some of the contradictions that had emerged in "Cuban structures and its value system" under the economic liberalisation of 1975-1985 (Petras and Morley 1992, p. 19), some economic measures contradicted the rhetoric. Most notable of these were the creation of capitalist like *Corporaciones* tied to the "export market strategy," which included joint ventures with foreign capital, and the associated attempt to institute "profit-maximizing and capitalist organizational principles" in industry (Petras and Morley 1992, pp. 20-21). Azicri (1992) similarly notes that under Rectification Cuba "retains major structural features of the more pragmatic 1976-1985 period" (p. 41), whilst Eckstein (1994) cites "ideal-typical capitalist" labour policies, such as the attack on promotion based on seniority (p. 66). The critical point for this research is that the national economy, and the conditioning influence of the world-economy, were the main factors behind the campaign. The politicised character of the campaign, whilst justifying unpopular economic measures, also highlighted serious, underlying problems in the project of

politicising the population, and motivating disciplined work and study based on moral-ideological incentives.

The rectification campaign responded to world-systems related economic and political problems, and in the process identified and sought to respond to domestic political problems with implications for secondary school education. The world-systems geocultural approach provides strong explanatory evidence for these problems, inherent in the conditioned model of secondary school education established.

Foreign debt and trade in the world-system

Throughout the history of the Cuban Revolution world economic conditions, and more specifically world market prices and terms of trade, continued to impact the domestic economic performance. Their influence necessarily varied in accordance with changes in the reliance on hard currency exports, and shifts in the degree of integration within the CMEA and the greater stability this provided. Planning for social and economic development on the island remained conditioned by questions of foreign debt (both to the Soviet Union and the West), and associated problems of currency valuations and interest rates; the terms of foreign trade and trade deficits; and the uncertainties of world market commodity prices, these having implications for all external dealings. All of these features of the world-economy contributed to the deepening crisis in the national economy from 1986. This process was acknowledged by the PCC at its Fourth Congress in 1991. Its Resolution on Economic Development, reflecting on developments since 1986, noted that the country had faced a range of external problems beyond its control:

> unequal terms of trade … changes in the dollar's exchange rate, the application of high interest rates, the burdensome limitations imposed by the foreign debt; and the decrease in the price of sugar have come together in these years and resulted in national economic losses of billions of dollars (cited in Reed 1992, p. 132).

The growing problems of hard currency foreign debt, that began in the early 1980s, grew dramatically between 1986 and 1988, with debt almost doubling from $3.5 billion

U.S. to around $6.5 billion U.S., easing only slightly in 1989 (see Figueras 1994, p. 149). The implications of servicing this debt, and the foreign trade situation generally, were so serious, that debt payments were temporarily suspended in 1986 (see Eckstein 1994, p. 72). The cost of servicing the debt as a proportion of total hard currency export income remained high, forcing the drastic reduction of hard currency imports, domestic consumption and investment projects linked to such imports.

There were a number of causes behind the debt crisis. Looking at the long-term picture, Figueras (1994) notes that as a proportion of GDP, exports had remained constant at 27% in 1958 and 28% in 1988, whilst imports had grown from 29% to 39% respectively (p. 40). Put another way, he cites an average annual increase in imports over 1958 and 1989, at constant prices, of 2.8% compared to a rate of just 0.8% for exports (p. 151). This long term imbalance was compounded by a range of factors, notably the poor growth of traditional exports and the falling purchasing power of Cuban exports (Figueras 1994, p. 152).

Most critically, as the world price for sugar fell from the historically high annual average of 27 U.S. cents / pound in 1980 to a low of just 4 cents by the mid-1980s, the re-export of between 2 and 2.5 million tons of oil had become Cuba's major source of export hard currency (see Eckstein 1994, p. 72; Figueras 1994, p. 149). Hard currency earned from the oil re-exports peaked in 1985, before a fall in oil prices saw this reduced by half in 1986, on top of the 80% reduction in hard currency from sugar over 1981-85 (Eckstein 1994, p. 72). Mesa-Lago (1988) cites a 40% or $600 million loss in hard currency exports in 1986 alone, adding that the situation was made more critical by the devaluation of the U.S. dollar against other currencies, effectively raising the price of hard currency imports (p. 84). In this context, Fidel's central report to the Third Congress of the PCC gave "absolute priority to all those investments that reduce hard currency imports or generate hard currency exports," calling for the latter to be diversified and increased by "at least 500 million dollars annually" over the 1986-1990 quinquennium (Castro 1986, p. 42).

The capitalist world-economy had a strong impact on the national economic situation through trade, commodity prices, and foreign finance and debt. This had major implications for the domestic political economy, and its objectives, targets, and

strategies in response to these conditions. The Economic Resolution of the PCC in 1991 recognised this influence, and the ways that it was disrupting national economic plans, and to some extent shaping national policy. Petras and Morley (1992) conclude that by the mid 1980s Cuba had fallen into the familiar Latin American debt trap:

> borrowing at exorbitant interest rates, pursuing the risky commodity export-based development game, rescheduling and capitalizing an increasingly insurmountable debt, imposing austerity programs to continue the flow of foreign funding, and trying to increase exports in a period of declining prices and restricted markets (p. 29).

The priorities outlined by Fidel at the Third PCC Congress and the domestic austerity package, all as part of the rectification, confirm this assessment. Petras and Morley (1992) add that the accumulation model from the 1970s to the mid-1980s, with primary commodity exports and the import of finished and capital goods largely financed through deficits with the Soviet Union, "began to exhaust its historical possibilities," leading to the all out pursuit of an export strategy in the world market (pp. 26-27). These conditions underlay the hard currency crisis, signalling that it would continue to constrain Cuban options and condition the national political economy. This is expressed by Azicri (1992) who notes:

> The extant domestic and international forces affecting the process of building a socialist system, in an underdeveloped country such as Cuba, play a major role in limiting policy choices (p. 45).

Problems of foreign debt and trade, based in the world-economy, impacted on the rectification campaign as the national economic consequences and responses drove the domestic process. National reform continued to respond to the world-system in ways mediated by the national political and socioeconomic context, as part of the general pattern since the triumph of the Revolution. This long-standing, constraining influence of the world-system is well illustrated in Rodríguez García's (1990) acknowledgment, writing prior to the collapse of the CMEA and Soviet Union, that despite the numerous achievements and positive economic progress made by the late 1980s, Cuba had been not been able to overcome "the inherited structural deformations, nor has it been able to

conclude the creation of the technical-material base of socialism" (p. 220). Implicit within these comments is the recognition of influences beyond the national boundaries of the island, constraining the planned development project of the Revolution over the long term.

As the shifts and historical changes within the CMEA began to be felt, the immediate implications in terms of trade, finance and aid through the Soviet Union and socialist community made major domestic reform unavoidable. If external events and conditions of the world-economy had conditioned the national economic performance, options and strategies prior to this point, this influence clearly intensified as the partial protection from the world-economy offered by the Soviet Union and CMEA gave way.[134] External events in the socialist community interacted and coincided with domestic (political and economic) problems related to the national development program, and strategies to achieve it. By 1990, long term trade agreements with the Soviet Union in rubles and Cuban pesos had given way to uncertain, annual agreements in hard currency, based on world market prices.

The influence of world market commodity prices, finance and interest rates increased, forcing dramatic responses to limit consumption, reduce hard currency imports, and develop a hard currency export focus for the national economy that maximised the return on these exports. As stressed, the capitalist world-economy pushed Cuba towards the familiar Third-World model of a commodity export dependent development strategy, this influence becoming increasingly more explicit. This predicament was acknowledged by Cuban economist Miguel Figueras (1994) who, in the context of emerging problems with the collapse of the CMEA and Soviet Union, compared Cuba's situation to that of other Latin American countries in the early 1980s, facing foreign debt crises, suspended credits, the resultant domestic austerity and import

[134] This 'partial protection' included guaranteed external markets with five year agreements at relatively stable prices; better terms of trade than those in the world market; and the automatic financing by the Soviet Union of any trade deficit (see Pastor Jr and Zimbalist 1995a, p. 707). As noted previoulsy, there were costs attached to these trade arrangements (see footnote no. 105 above, p. 203).

reduction programs (p. 154). Two decades of trade within the CMEA had not fundamentally transformed the Cuban economy.

National indicators within the capitalist world-system

Cuba moved through acute economic crisis over 1986-87, with the austerity measures bringing some recovery, before the collapse of the CMEA countries over 1989-90, and Soviet Union over 1990-91, brought a far more serious situation. Figueras (1994) confirms this broad picture, citing a dramatic downturn, to the point of negative growth, in Gross Social Product (GSP), Gross Domestic Product (PIB), and National Income (IN), over 1985-87, with the subsequent recovery bringing these indicators back to mid-1980s levels by the end of the decade (p. 36). External conditions, with the end of the CMEA and the non-arrival of Soviet imports, saw all national economic indicators in serious crisis by 1991, with worse results to come.

On one level, the initial poor performance of the Cuban economy in this period, and particularly the problems associated with foreign debt and trade, were rooted in the basic structure of the national economy. That is, the continued dependence on primary commodity exports to finance the import of finished and capital goods for domestic growth. To this end Petras and Morley (1992) note that after the growth and expanded consumption of the 1970-1985 period:

> the structure of the Cuban economy remained basically unchanged …. sugar sales and oil re-exports to the Soviet Union continued to predominate in the external sector … [adding that] … these persistent structural vulnerabilities converged with shifts in the international environment to produce a marked downturn in the Cuban economy (p. 15).

It was this conjuncture of domestic structural problems, linked to the world-economy, that characterised the problems faced by Cuba in the late 1980s.

The domestic downturn outlined by Figueras (1994) was thus based in this conjuncture of external and domestic problems. The internal problems were not new, but persistent problems of efficiency, labour discipline, inadequate work norms, and a number of specific problems associated with the market reforms of the SDPE. Eckstein

(1994) notes that the proportion of unprofitable agricultural collectives rose from 11% to 30% in the early 1980s, promoted by problems of absenteeism (pp. 64-65). She cites official criticism of workers' attitudes and the excessive demarcation of occupational tasks, coupled with calls for multi-skilled workers and occupations, these being indicative of internal labour problems (p. 66).[135] Pérez-Stable (1993a) confirms this trend, citing a 1986 editorial in *Granma* calling for the "elimination of 'paternalism' from an 'excessively protective, generous, benevolent, magnanimous' state" (p. 160).

Eckstein (1994) adds that the national budget deficit had blown out to some 266 million pesos in the mid 1980s, with the market reforms benefiting individuals "at the state's expense" (p. 73). Figueras (1994) notes the growth of the budget deficit as a percentage of GDP, from 10% in 1986 towards 16% by the end of the decade, such that:

> the efficiency of the productive Cuban economy does not guarantee the financing of national (global) consumption and gross investments … the future solution of this problem can only be to increase the efficiency of the enterprises (p. 44).

This analysis sets the tone for the economic policy prescriptions within the Rectification process. Hence whilst the rectification campaign is often cited in reference to the seemingly ideologically driven closure of the Free Farmers Markets and the end to private housing construction, for example, the broader process was characterised by a general push for greater cost efficiency of all state enterprises and the emphasis on hard currency earning exports. To this end, Rodríguez García (1990) cites the objectives for the period in familiar terms: deepened socialist economic integration; accelerated socialist industrialisation; increased efficiency and scientific-technical development; improved organisational efficiency of national investment processes; the rational use of labour; and the development of value added hard currency exports (p. 224).

The official critique of Rodríguez García (1990) thus emphasises domestic problems in the investment process, in line with Fidel's criticism that while gross investments had

[135] Indicative of this demarcation, Eckstein (1994) notes that the number of official job classifications had risen from 10 000 in 1970, to 14 000 in 1983 (p. 66).

continued to increase, they were not invested in areas of most need. Figueras (1994) also cites incomplete investment project in the 1980s, and emphasises the chronic problem of poor exports growth in world terms, linked to the investment process. In 1986 Fidel announced the creation of a new national commission, attached to the Executive Committee of the Council of Ministers, to oversee and reform the work of the SDPE, that would ensure a more efficient investment process targeting hard currency earning export industries (Castro 1986, pp. 42 & 55).

Thus within the world conditions of unfavourable terms of trade, poor commodity prices, high interest rates, the domestic economic performance became more acute. In this context, expanding consumption, and growing privileges for an expanding bureaucratic class, could no longer be sustained. Bengelsdorf (1994), for example, cites Fidel's criticism of the excessive number of bureaucrats, linked to the critique of the SDPE, the number of administrative personnel growing from just 90 000, prior to the SDPE in 1973, to over 250 000 in 1984 (p. 151). Pérez-Stable (1993a) adds that as a result of this, some 6 300 administrative workers and 16 400 administrative cadres had been sacked or transferred to productive work between 1986 and 1988 (pp. 162-63). In summary, it emerges again that the problems faced under the rectification campaign were focused on the efficiency and productivity of the national economy in world markets, and the ongoing search for a strategy of long term and sustainable development, via the transformation of the national economy.

Economic crisis, 1989-1991

Detailed Cuban material and analysis of the domestic economic performance for this period, particularly for 1990-91, are limited in comparison with earlier periods. The unconventional structure of the IV Congress of the PCC in 1991 meant that the usual, detailed statistical review of the national economy over the preceding five year period was not made (see Castro 1991, p. 25). Instead, a large part of Fidel's central report to the Congress was taken up with the external situation, detailing the uneven extent to which agreed imports from the Soviet Union had arrived, in the context of the single

year agreement negotiated in 1990. Without relying on macro indicators of economic performance, it is clear from Fidel's review of these shortages, and the external dependence of the national economy, that a major crisis was being confronted.[136]

The decision to conduct all CMEA trade in hard currency in early 1990, followed by the complete demise of the organisation and the impending restoration of capitalism in the Soviet Union by mid-1991 , brought the beginnings of Cuba's 'special period in peacetime' (for an inside chronological Soviet perspective see Vorotnikov 1995, pp. 445-84). By the end of 1991, the Cuban economy was in major crisis, with massive reductions foreign trade, national production and consumption, and no quick solutions in sight. Even Mesa-Lago (1993b), who asserts that the economic decline began in 1986 due to the winding back of some market reforms, acknowledges that the dramatic deterioration of the national economy post-1990 was "principally the result of the collapse of socialism in the USSR and Eastern Europe" (p. 176). Major restructuring began, targeting international tourism and more attractive terms and guarantees for foreign investors, as a means of acquiring hard currency for essential imports, whilst the character of national production and work relations began to change.

In the Fourth Congress of the Communist Party of Cuba held in October 1991, Fidel announced that external trade moved "quite normally" until 1989, after which problems began to emerge (Castro 1991, p. 37). Of the 5.13 billion rubles worth of imports agreed upon for 1990, just 3.83 billion arrived by the end of the year, with a further 0.3 billion arriving prior to May 1991. Most critically for Cuba, the shortfall largely constituted oil shipments, producing serious oil (and hence transport and power generation) problems in Cuba by the end of 1990, and ending any prospects of a return to oil re-exports. At that time a trade agreement was made for 1991 alone, rather than the conventional five years, in which Cuba's purchasing power was cut by some $1 billion U.S. as all trade was to be done in hard currency, and sugar prices were lowered from $800 to $500 U.S.

[136] This dependence is acknowledged by Rodríguez García (1990), who cites the country's "high level of external dependency," and subsequent "sensitivity to the external sector," as a significant and persistent historical obstacle to the country's development program (p. 209).

per ton (Castro 1991, pp. 40-41). Under these terms, just $3.94 billion U.S. of Soviet exports to Cuba were agreed to, with oil imports cut drastically from the traditional 13 million to 10 million tons (p. 41). The agreement was renegotiated down to $3.363 billion U.S. in September to cover Cuban debts to the Soviet Union, and Fidel noted that as of September 30 only 38% of agreed imports had arrived (pp. 43-48).

Fidel's central report to the Fourth Congress of the PCC, with the Soviet Union on the brink of collapse, leaves no doubt as to the seriousness of the shortages already being experienced by the island, and the prospect of much worse to come. By August 1991 any prospects of ongoing, special trade arrangements with Moscow were lost (see Pastor Jr and Zimbalist 1995a, p. 707). Figures provided by Pastor Jr and Zimbalist (1995b) show the full extent of the post-1989 economic decline, and the rapid fall into crisis. They cite real GDP as falling from $32.5 billion in 1989 to $23.6 billion in 1991, whilst the annual growth rate for real GDP moved from just 0.1% in 1989, down to a rate of – 3.1% in 1990, and then – 25.0% for 1991 as the Soviet Union collapsed (p. 11). Other indicators compound the depth of the crisis provoked by the collapse of international socialism. The decline and loss of agreed markets for Cuban exports, and sources of essential imports, saw the value of exports fall from $6.2 billion in 1990 to $3.9 billion in 1991, a 37% fall, again with worse to come. The reduction in imports saw total imports fall from $8.6 billion in 1989 to just $4.6 billion in 1991.[137] Thus within just two years, imports fell by almost 50%, whilst the budget deficit as a percentage of GDP blew out from 4.3% in 1989 to 15.7% in 1991.

The collapse of the CMEA, and the subsequent negative impact on the domestic Cuban economy, was made worse by the islands ongoing dependence on imports for "capital goods and intermediate goods – like oil – for which there were few domestic substitutes" (Pastor Jr and Zimbalist 1995b, p. 8). Thus where Rodríguez García (1990) cites the obstacle of external dependence for national development, Pastor Jr and

[137] These comparative figures are in U.S. dollars. It is worth noting here that the fall continued into 1992-93, before some very slight recovery began to be felt. By 1993 the situation was critical: the value of total Cuban exports was just $2.6 billion U.S.; imports $2.4 billion (28% of their 1989 value); and the Budget Deficit as a percentage of GDP stood at a record high of 31.5% (Pastor Jr and Zimbalist 1995b, p. 11).

Zimbalist (1995a) add that prior to these external shocks: Cuba remained heavily dependent on a single export commodity to a large trading partner; national industries relied on imported capital goods, including oil for power; and goods produced by national industry were largely for domestic consumption (p. 706). These characteristics of "dependent developing economies" (Pastor Jr and Zimbalist 1995a, p. 706), at the time of the collapse of the socialist bloc, exacerbated the impact of its collapse.

The macro-indicators of economic performance over 1989-91, in this context, translate directly into serious shortages of basic goods and services for the population. The dramatically reduced capacity of the national economy to import required goods and services fuelled further internal decline. The response of the leadership involved domestic austerity to reduce demand; cuts in domestic energy consumption; the strict rationing of an increased number of consumer goods and the virtual disappearance of others; a national focus on expanding import-reducing food production aimed at self-sufficiency; the mobilisation of the population into voluntary work within the food program; a renewed focus on international tourism and biotechnology as targeted export industries; and the promotion of foreign investment and joint ventures to substitute for lost capital markets and investments (see Pastor Jr and Zimbalist 1995a; Pastor Jr and Zimbalist 1995b; Ritter and Kirk 1995; Ritter 1992; Carranza-Valdéz, Gutiérrez Urdaneta, and Monreal-González 1995; Mesa-Lago 1993a).

The national context for secondary school education, over 1986-1991, moved through domestic economic problems conditioned by the world-economy, and a national policy response in which politics and history were used to implement strategies designed to restart the national development program. If the old model of accumulation had exhausted its possibilities by 1986, the collapse of international communism removed the basic framework within which the socialist development strategy had been pursued in Cuba over the past two decades. The response of school education to these conditions provides further insight into the structure and perceived functions of the model constructed in Cuba, and in turn the conditioning influence of the world-system over this historical process. As the country, the government and its people struggled to come to terms with the new world conditions of the 1990s, schools were necessarily affected by the economic and political shocks experienced by the country.

SECONDARY SCHOOLS AND THE WORLD-SYSTEMS GEOCULTURAL INFLUENCE

The national and global context in which secondary school education developed was one of severe and unprecedented crisis and turmoil. In this context, the world-systems geocultural influence continued to impact on the national economic performance, objectives, options and strategies, and the intended role of secondary school education within the national project. Secondary school education continued to be influenced by the world-system through the conditioning of the national political economy, and more directly through the world-systems geocultural influence on school models, structures and objectives within the nation-state. Amidst the turmoil of the economic and political crisis of international socialism, the influence of the world-economy over the Cuban political economy, and its resultant restructuring, the fundamental goals, structures and practices of secondary school education in Cuba remained relatively unchanged. Indeed, the trends established in the preceding period, in accordance with dominant world-systems models, structures and functions of secondary schooling, were extended. The result for secondary school education continued to be a fairly predictable, orthodox system, using common methods of competitive selection and specialisation, to prepare students for different professional and vocational trajectories.

This analysis of secondary schooling begins with some detail on problems in school education, identified within Cuba in the context of the rectification campaign. This internal discussion and presentation of problems in secondary school education provides significant evidence of the world-systems geocultural influence. This is seen through the approach of the government towards the schools and their perceived problems, implementing and reforming policies to achieve intended outcomes. This process also provides further insights into the intended outcomes of the school educational process, and the structures and methods in place to achieve them. This is followed by sections on secondary schools socialising patriotic citizens; preparing skilled human capital for work; and a final review of their basic structures, organisation and practices, established to pursue the world-systems conditioned objectives. Throughout the analysis of secondary school in this period, the world-systems geocultural influence is identified as the broad framework within which national school education policy and reform took place.

Rectification and problems in secondary school (political) education

Within the context of the rectification campaign, a number of internal and external critiques of youth policies were made, particularly with respect to the political formation of the youth. Documents associated with this provide critical evidence of, and insights into, the world-systems geocultural influence on the model and policies for secondary school, and the general approach of the government towards the intended outcomes of schooling and how to better achieve them. The criticism additionally raises questions about the potential role of the model of secondary school education in the identified problems and contradictory outcomes. For the purposes of this research, evidence is used from this process to emphasise the conventional attitudes toward and objectives of secondary school education, and its reform, based around socialising loyal citizens who were given a 'quality' training in preparation for working life. This evidence confirms the established picture of an orthodox or conventional model of secondary schooling conditioned by world-systems influences.

In the context of outlining the rectification campaign, Fidel publicly criticised teachers, and school education more generally, focusing on the quality of teachers work, their fulfilment of educational objectives, and the constraints on this imposed by excessively bureaucratic practices. In his July 26 speech in 1986, Fidel cited problems of MINED's assessment of teachers work being based solely on promotion rates achieved by their students, something that was leading to students being overly prepared for their exams to ensure high promotion rates, to the point where teachers covered specific exam material in classes prior to the formal examinations (in Castro 1988, p. 100). This criticism was extended in a speech by Fidel to the 'XI National Education Seminar' held in February 1987. Here again he detailed problems of "*promocionismo*" (excessive attention on ensuring high rates of student promotion), and "*facilismo*," the

latter referring to the teachers preparing students for exams to the point that they were easy (*facil*), thus ensuring high pass rates (in Castro 1988. p. 108).[138]

The implications of the official criticism of *promocionismo* and *facilismo* in secondary school education are apparent. First, it highlights the official commitment to socialising students with an authentic, internalised commitment to the socialist project, and the belief in the ability of school education to provide quality content knowledge that could be examined to sort students according to some measure of inherent ability or talent. By asserting that *promocionismo* and *facilismo* were undermining the quality of school education and its graduates, the belief that this quality could be achieved through more rigorous assessment, and improved teaching methods, was implied. More broadly, this highlights the underlying belief that such objectives could be achieved in schools, once the correct policies, content, and teaching methods were applied. Thus Fidel, and subsequent MINED documents, described the problem in terms of the need "to find a formula to conciliate the adequate lifting of standards, quality and promotion rates with mass education" (Castro 1988, p. 115). This emphasis on *quality*, and how to achieve it in a system of mass, public education, further confirms these implied assumptions in the critique.[139] Quality mass education that prepared student citizens for life and work in the nation-state, in a beneficial way for national development plans, was not questioned. In line with world-systems geocultural conceptions about the school and how it could achieve such objectives, more competitive, centralised examinations for students would follow.

Fidel also specifically addressed the problem of these tendencies and practices for the teaching of political subjects in secondary schools and other institutions. In a speech to close the Fifth Congress of the UJC in April 1987, he stressed the need for cadres and

[138] Terms like these are difficult to translate, hence the Spanish word is used. While the term 'promotionism' might make some sense for *promocionismo*, the word *facilismo* is an invented term based on the Spanish word for easy (*facil*). Used in this context, it simply referes to the practice of making exams too easy for students, to ensure that they all pass.

[139] This concept of 'quality' in education, and associated notions of quality management in industry and business, and measures of quality control, were a major part of rhetoric throughout the capitalist world-system at this time, clearly having some impact in Cuba.

school teachers to model desired socialist and revolutionary behaviour, morals, attitudes, and the application of Marxism-Leninism, adding:

> We might have a teacher teaching Marxism, 400 hours in a semester if you like, and if they are a bad example to their students all the books and the 400 hours of Marxism-Leninism are worthless (in Castro 1988, p. 138).

The critique of the potential contradiction between the political content being presented to students in classes, could clearly be extended to include contradictory actions and events in any area of general political and social life. Again the critical point is that this highlights the conventional approach to, and structures created for, school education, with teachers imparting content knowledge to be learned by students. The contradictory outcomes were put down to teachers not adequately applying the content knowledge they imparted, whilst the approach of teaching this knowledge in schools and classrooms was not questioned.

Other indications of problems in school education, and the political-ideological formation of students, emerged in Cuba in the Sixth Meeting of Youth Researchers held in Havana in 1989. In one of the commissions on labour activity and economic education, Casañas Mata et al. (1989) noted that the achievements of the Revolution, in terms of equal opportunities and access to health care, education, employment and potential participation in state and social institutions, had produced "heightened levels of expectations" amongst the youth (p. 3).[140] They add that whilst in this context conditions were "theoretically" right to develop an attitude towards work in students based on heightened moral and socialist values, the socialist revolutionary process had not "automatically provoke[d] a change in the content of work and the labour functions of the workers in socialist production" (p. 3). They effectively extended the argument made by Fidel, acknowledging that the actual practice of work in Cuba had not

[140] The report, *VI Reunión de Investigadores de la Juventud: Ponencias Centrales*, accessed in the Centre of Educational Documentation and Information in Old Havana (CDIP), contains the central presentation by a collective of authors to each of the separate commissions of the meeting. In the published report, the numbering restarts for each presentation to each commission. Hence, the numbering used for this document refers to the separate numbering of each specific presentation.

necessarily changed its character under the Revolution, such that real life conditions potentially contradicted the political content taught to students in schools, and promoted a contradictory attitude towards work. Irrespective of the impact this may have had on the intended socialisation of the youth for work, it further underlines the intention to prepare good workers through secondary school education.

Further problems in the preparation of required labour, through the national education system, are raised in the presentation of Casañas Mata et al. (1989). In reference to contradictions between "what is institutionally established and that which occurs in social practice," they argue that the approach of steadily lifting the educational level of the emerging labour force "does not, on its own, determine that they are prepared to play the role that corresponds to them in our society" (p. 4).[141] In addition, they referred to an inadequate correspondence between economic and educational planning, despite this being a high priority in formal policy, and acknowledged the "high social status of University level professions … [and] … undervaluation of activities directly related to production and workers' occupations" (p. 6). These criticisms from within Cuba provide further support for problems in the intended preparation, in schools, of socialist citizens with matching attitudes towards work. Significantly, they also provide evidence of the official perception of school education and the world-systems influence on this, in this case with respect to their function sorting students into different occupational paths, in accordance with the requirements of the national economy.

The hierarchical specialisation and selection of students at upper secondary in Cuba, was officially based on a meritocratic functionalism. Having universalised the provision of and access to school education for all sections of society, individuals were to be selected for different specialised academic or vocational training according to their

[141] Guerro Borrego and Romero González (1989), in their text on youth relationships, similarly observe that "the total transformation of the old customs, habits, conceptions and ideas of capitalist society are not substituted at the same time as the economic structure," stressing that "this requires time and intense ideological work" (p. 80). Such observations implicitly acknowledge ongoing problems in the objective of students converting socialist morals and principles into personal convictions.

performance, and identified vocational orientation. As in other supposedly meritocratic systems, students were ideally to recognise the equity of this process, and thus accept and work hard in their consequent career or occupation in the workplace and society. The report by Casañas Mata et al. (1989) highlighted major problems between these intended outcomes and the reality, with the hierarchical sorting and division of individuals in secondary school clearly translating in practice as differential status for individuals, compounded by differential wages based on the educational qualifications.

What this implicitly highlights is the presumption, by the Cuban authorities and policy makers, that this ideal of meritocratic functionalism could be achieved through secondary school education. That is, a fundamental belief in meritocracy, providing further evidence of the world-systems geocultural influence over the whole construction and basis of the national system. This influence can be seen in the process of secondary schools providing differential qualifications, sorting students into hierarchically organised occupations in economic life. Additionally, the acknowledged result of students searching for higher qualifications to improve their status, occupation and work conditions, is indicative of world-system level models of differentiated education. Most importantly the belief that these could be overcome through the selective and officially meritocratic system, and the improved socialisation of citizens in schools, is evidence of this world-systems influence on the educational project.

Finally, there were further indications of problems in the process of students' political education and formation, into the mid and late 1980s. González Rey et al. (1989) observed problems in the attitudes and functioning of the UJC, asserting "insufficient motivation of militants before determined activities of the base organisations" (p. 5). Secondary sources from outside Cuba, like Bengelsdorf (1994), interpret the late 1985 dismissal of the Politburo member and secretary of ideology, Antonio Pérez Herrero, as evidence of internal "critiques of the manner in which those in charge of ideology had enforced the application of a kind of dogmatic Marxism-Leninism in various areas" (p. 143). Bengelsdorf (1994) goes on to describe the 1989

ban in Cuba of two popular Soviet magazines: *Sputnik* and *Moscow News*, in the context of perestroika and articles in the magazines being critical of Cuba.[142] She cites the editorial from *Granma* announcing the decision:

> [W]ith pain and bitterness we have had to confront the consequences of this confusion, of all these ideas, in young people who have been poorly informed in terms of ideology and history, a state of affairs for which we are responsible (cited in Bengelsdorf 1994, p. 149).

The inference from the leadership, and implication of these events is clear. Despite having received their entire formal education within socialist Cuba, the youth were apparently left 'poorly informed in terms of ideology and history'.[143] Importantly, this extreme interpretation from within Cuba confirms the perceived inadequacy of the process of students political formation, in terms of the content knowledge being uncritically or dogmatically conveyed to students in schools. This in turn highlights the long-standing belief in the ability of school education to achieve this political formation and socialisation of the youth, through conventional methods of imparting and then formally assessing students assimilation of content knowledge. The analysis that follows provides further evidence that, despite these critiques, this general approach to secondary schooling continued throughout this period. That is, an approach shaped by the world-systems geoculture of development, pursuing the formation of politicised citizens and skilled workers through a conventional structure of basic general and post-compulsory specialised, secondary schooling.

[142] Bengelsdorf (1994) cites articles questioning Soviet financial support and aid for Cuba, and supporting the concept of a multi-party political system (p. 149). Azicri (1992), citing Katherine Ellison, adds that reports in the Soviet press criticised Cuba's *Rectification of Errors and Negative Tendencies*, and presented "a more critical portrait of Cuba" (p. 40).

[143] Some of this 'confusion' was no doubt based in the source of such ideas being the Soviet Union, long presented in Cuba as the vanguard of international socialism whose Proletarian Revolution was irreversible. Subsequent events fuelled this confusion, and continue to provide political problems for the Cuban Revolution.

Socialising patriotic citizens of the socialist state

The problems and criticisms outlined above reinforced the importance of school education, within formal policy, in the communist formation of the youth. The critique had involved a perceived lack of commitment to work in new graduates, and difficulties in attracting youth to lower-status occupations (see for example Casañas Mata et al. 1989; Turner et al. 1989). Thus policy objectives of students' communist formation in this period continued the already identified trend, defining this in terms of their preparation for life and work in the socialist state. In this way, policies and statements that might previously have been categorised under national political objectives, directly as part of world-systems geocultural approach of educating or creating good citizens of the nation-state. That is, citizens who in part identify their personal interests with those of the state, and recognise their rights and obligations within the state. Citizens with skills, learned behaviours and attitudes, required for effective participation in work and social life.

Evidence of this influence is apparent in specific statements from Ministry personnel. Writing in the context of the beginnings of the rectification campaign, Mier Febles (1986) reaffirmed the long-standing objective to "educate people for life through work and socially useful creation" (p. 3). He similarly emphasised the need for schools to simultaneously "exalt individuality and demolish individualism," in order to facilitate the "rational utilisation of the collective intelligence" of the future labour force (p. 7). Along similar lines, Arias (1988) described the teaching of Marxism-Leninism in terms of its links to "life, the revolutionary renovation of the world, and the practice of the struggle for socialism, the construction of socialism and communism" (p. 67). In both cases, the world-systems influence can be seen in the goal of preparing students to participate effectively in work and social life, identifying with the national development project. This is highlighted in a document assessing the project of instilling specific values in students, in which Baxter Pérez (1989) described the desired new socialist citizen as one who "thinks, feels and acts in accordance with what society demands and requires of them" (p. 27).

Specific reforms involving the use of PCC documents and materials for students political formation, can also be interpreted as being directed, in part, to the socialisation

of loyal citizens of the state. Such moves also promoted the legitimacy of the socialist state, the Communist Party of Cuba and the revolutionary government. Thus when Baxter Pérez (1989) described the application of theory to the building of socialism as something to be achieved "with the documents of the Communist Party, the media and other materials, and in extra-curricular activities" (p. 69), some potential influence of socialising citizens loyal to the Party and state is evident. Further along this line, RM 256/88 established systematic political activities for secondary schools linked to the socialist or revolutionary figure after whom the school was named. The activities, as part of students' political formation, were expressed as being intended to promote their "spirit of loyalty to the Party and the Revolution; love for the homeland; value and heroism; the socialist morals and the permanent disposition to meet internationalist obligations" (Fernández 1988b, p. 127). The attempt to create loyal citizens or members of the state is, in this case, directly stated. The preparedness of graduates to fulfil their obligations in the socialist state was an intended outcome of this process, and a measure of their citizenenship formation.

The concept of 'formal education,' as a policy to promote orthodox social values and behaviour in students was a part of the broader goal of promoting self-discipline, including obedience and respect for authority, to be later transferred by students into their working and social lives. Additionally, the policy was part of a world-systems influenced cultural conception of the citizen member of the nation-state, and the role of the school in socialising these citizens. For example, the individual qualities and values sought by socialist Cuba were listed by Arias Beaton (1988), who described the desired students and citizens as "honest, honourable, organised, conscientious [*exigente*], perseverant, intransigent, collectivist, disciplined" (p. 68). Personal qualities like these, pursued in schools, are indicative of a world-systems influence on the role of schools socialising citizens, with these outcomes presented as resulting from "the whole process of formation and the type of educative work used in this process" (p. 71). It is clear that the qualities and values being sought were far from exceptional in world-system terms, revolving around students' self-discipline, recognition and respect for authority, the latter including respect for adults in general, as well as teachers and political leaders.

Officially pursuing these types of qualities, under the label of formal education, also involved attention being given to student behaviour, as an outward expression of their internalising of the desired qualities (see Amador Martínez and Tenorio 1987; Ruiz Aguilar 1988; Pérez Fowlert 1990). As a result, aspects of student behaviour and appearance were expressed as measures of their formal education, these in turn presented as a measure of their assimilation of the qualities held by the desired personality of the citizens emerging from the schools. In this context, a range of very specific aspects of students appearance and behaviour were identified as behavioural problems to be rectified, in order to achieve the desired socialisation. These included things like students not combing their hair; not tucking their shirt in; or using inappropriate language (see Ruiz Aguilar 1988, pp. 95-97). Thus in ways similar to institutionalised behavioural rules and regulations of schools across the world-system, schools and teachers were instructed to give attention to and reward what Fidel labelled as "a spirit of urbanity … knowledge of how to conduct oneself correctly" (cited in Ruiz Aguilar 1988, p. 93). The goal, as expressed by Amador Martínez and Tenorio (1987), was for students' conscious, self-regulation of their behaviour, internalising an understanding of school and social rules, and being willing to comply with these rules (pp. 52-53). Here too the goal of socialising of disciplined citizens was made explicit.

These qualities or attributes of individual's personalities were further extended in the return of the subject of 'civic education' in 1990, replacing at least one of the political subjects introduced in the 1970s.[144] An article in *Educación* noted the rejection of the subject in the early stages of the Revolution, based on its socialisation of students "in the ethical and civic principles of capitalist societies" (Colectivo de Autores 1990, p. 102). To justify its return, the authors added that its earlier removal from school curricula "was not complete," since the "universal ethical values" contained in the original subject "were conserved as educational objectives of all the subjects in the new

[144] Over 1988-89 the subject 'Political life of my country' was replaced by the new subject: *The world in which we live* (year 1-4); 'Fundamentals of political knowledge' was replaced by *Civic education* (introduced into year 5 and replacing that in year 9); and 'Fundamentals of Marxism Leninism' remained for year 11 and 12 (see MINED 1988a, 1988b, 1992). The latter, however, experienced significant changes to its content that are detailed below (p. 289).

National System of Education" (p. 102). The authors thus acknowledged the acceptance and promotion, within revolutionary Cuba, of what they identified as "universal values," to be instilled in students as part of the socialisation of good citizens. The values expressed included qualities like "modesty, loyalty, sincerity, veracity, patriotism, … solidarity between people" (Colectivo de Autores 1990, p. 100). In the process, a world-systems geocultural influence on these desirable social objectives being pursued in secondary schools in Cuba is made clear.

The article on civic education also noted mixed results for the new political subjects introduced under the *perfeccionamiento* of the mid-1970s, in terms of their political objectives, and the transmission of these universal ethical and civic values (Colectivo de Autores 1990, p. 102). These uneven results were attributed to the lack of a concrete link between the abstract content of the subjects and actual social practice, with the subject of 'civic education' being presented as the response to the need for the "systematic formation of students' habits, and norms of behaviour and social coexistence, that responds to socialist ethics" (Colectivo de Autores 1990, p. 102). The detail provided on the intended outcomes of the subject provides further evidence of the world-systems geocultural influence, directed to socialising loyal and patriotic citizens who respected the laws and institutions of the state, and shared universal ethical values required by modern society. The new subjected was officially intended to:

> strengthen the schools' treatment of moral, juridical and civic aspects … contribute to the development of knowledge, capacities, habits, abilities, sentiments, values and norms of behaviour required for the ethical formation of the new person … not to eliminate the study of Marxism-Leninism, but guarantee its authentic, conscious assimilation through a systematic ideo-political, social, labour and juridical formation of the youth, manifested in their daily life, linked to the practice of the construction of socialism (Colectivo de Autores 1990, pp. 102-103).

The reappearance of the civic education, and its replacement of the more explicitly political subjects, must be seen in the context of the collapsing Soviet Union and Eastern European socialist states. It represents a shift towards more direct, and open,

civic and citizenship education and formation in school, further extending the world-systems influence on this process. World conditions made the teaching of Marxism-Leninism, particularly in its schematic and dogmatic form as noted above by Bengelsdorf (1994), potentially even less effective for achieving such citizenship objectives and instilling universal ethical and social values in students. These conditions led to nationalistic or patriotic, citizenship objectives being explicitly expressed. Changing world political and economic conditions thus further weakened the potential of the political subjects to instil the desired loyalty and commitment of citizens to the state, leading to the socialist project and citizens' responsibilities to it being cast in increasingly nationalistic or patriotic terms.

This heightened emphasis on nationalism and patriotism is reflected in the MINED (1992) reporting of changes and reforms over 1989-1991. In the context of the collapse of international communism and the emergency situation in Cuba, these reforms included: a new emphasis on the teaching of Cuban History in both primary and secondary school; changes in teacher training to improve their "patriotic and civic formation"; and a general call for all teachers to "give priority in their syllabi to the history of Cuba and Spanish language" (p. 27). With respect to the remaining study of 'fundamentals of Marxism-Leninism' in year 11 and 12, Paulina Blanco Caballeria (1990) cited Fidel on the need for this to proceed "less dogmatically, more dialectically" (p. 68). In response to this, she noted that the Ministry of Education had incorporated "qualitatively new elements" into the subject, in an attempt to make it more relevant to contemporary conditions, the specific Cuban experience, and the line of the Cuban Communist party (p. 68). These reforms further highlight the way in which the national response to the shifting world economic and political conditions, reinforced rather than changed the existing world-systems objectives of instilling civic and patriotic values in students through secondary schooling.

New units of work were introduced into the 'Fundamentals of Marxism-Leninism' subject, changing its content in a way that emphasised the broader citizenship objectives. The formal, central objective of the subject continued, intended to:

> contribute to the formation of our youth as true revolutionaries, prepared for life, capable of acting as such, with basic

> knowledge of Marxist-Leninist theory, dialectical materialist thinking, and with solid political and ideological convictions (Blanco Caballeria 1990, p. 69).

Further detail on the content of the new units of work, however, effectively demonstrate the ways in which this explicitly political-ideological subject sought to simultaneously: provide legitimation for the state and its response to the new world conditions; socialise correspondingly loyal and patriotic citizens; and contribute to economic development by instilling in students the importance of their future work efforts to the nation. Within these reforms then, the conditioning influence of the world-systems geoculture of development is apparent in the intended role of the secondary school, socialising citizens of the socialist state ready to contribute to its plans and projects. These objectives, and the world-systems geocultural influence within them, extended those identified over the course of the Revolution.

The new units described by Blanco Caballeria (1990) included:

1. "We are Martíanos and Marxist-Leninists," presenting the official politics as the synthesis of the thinking of the national hero Jose Martí, Marx and Lenin (p. 70);
2. "The Cuban Revolution, creative process," focusing on the particularities of the Cuban process and identifying revolutionary and counter-revolutionary actions (pp. 70-1);
3. "Socialism, the only alternative for the development of Cuba," intended to demonstrate the superiority of the socialist development model for Cuba (p. 71);
4. "Work, the source of wealth," to highlight "the importance of work in a persons life … [and] … the objective to raise economic efficiency and, in turn, the development of socialism" (p. 71);
5. "The youth, in the centre of the current ideological struggle," noting the targeting of the youth by imperialism and the need for the youth to recognise and reject any ideological diversion (pp. 71-72);
6. "The scientific and technical revolution: its repercussions for contemporary social development," on the importance of science and technology in solving the problems of humanity (p. 72); and finally
7. "Socialist Cuba and its relations with the world," on the foreign policy of the Cuban state and the PCC. This unit was to include discussion of the "contradictory character" of Cuba's current and growing relations with capitalist countries, allowing for "debate, live discussion, the participation of students putting forward their problems…" (p. 73).

All of the new prescribed units of work show an influence of patriotic and citizenship type objectives, cast in terms of the tasks for students and graduates within the national, Cuban socialist project. The legitimation perspective of the first three units is clear, the content aimed at presenting the Revolution, its leadership and the socialist project as the logical culmination of the country's history, and its struggle for independence. World-systems geocultural influences in conceptions of school education assisting national development plans, combined with the world-economy's constraining impact over Cuba's capacity for development and growth within the world-system, are equally explicit in units four and six. Units five and seven were directed towards students acquisition and acceptance of the governmental and Party line, again indicative of a world-systems influence on the goal of educating loyal and patriotic citizens, with the specific tasks of state building and legitimation in socialist Cuba.

Clearly the impact of the collapsing socialist community, and the political and ideological implications of this for Cuba, run throughout these reforms. The fact that the collapse of the CMEA and with it, trade amongst the socialist countries, impacted on Cuba is not surprising, nor does it provide particularly insightful evidence of the world-system influencing this nation state. The context is instructive, however, in that this process expanded existing world-system level conceptions of using education for state legitimation and citizen formation, as well as the need for national economic development and for school education to efficiently assist this process. Thus in the context of the collapsing socialist bloc, Martínez Pereiras (1990b) continued to describe the Cuban school in terms of forming "the new generations of revolutionaries, the firm bastion of ideological confrontation and struggle" (p. 20), politically loyal citizens being required more than ever if the Cuban socialist development project was to have any future.

The reforms and statements analysed above, aimed at socialising patriotic citizens of the socialist State, frequently included students' preparation for work as a part of the objective. Indeed, like the citizenship objectives above, this consistent feature of secondary schooling in revolutionary Cuba continued and was given greater emphasis in this period, particularly as the unprecedented economic crisis with the collapse of the

Soviet Union and CMEA emerged. Here too, continuity based in the conditioning world-systems influence is found.

Preparing skilled and qualified labour

Previous chapters have consistently identified secondary school educational thinking, literature, policies and reforms based in objectives of training the future labour force to increase national economic development. Policies based in this objective were predominant throughout the Revolution, to the point that the political objectives of school education, for example, came to be frequently expressed in terms of the project for national social and economic development, and the role of secondary school in preparing students to contribute to this project. A world-systems geocultural influence on this process has been consistently identified through the inherited underdevelopment of Cuba promoting the development imperative, and the geoculture of development involving secondary school education in the process of training labour to contribute to the national development plans.

In line with the approach set out for this chapter, the focus of this section is on identifying evidence of this aspect of the world-systems geocultural influence, in policies, statements and literature about secondary schools. That is, a focus on the broad area of pursuing national social and economic development, for the sovereign nation-state, through the preparation of labour in secondary schools. In the process, policies reflecting what were labelled political and economic development objectives are discussed, in terms of the world-systems geocultural influence, and the ways these influences were translated into policy in the Cuban historical context.

Part of the world-system level approach to school education sees it contributing the basic skills and values or attitudes required by human capital, as a necessity for national economic development (see Marginson 1997, pp. 92-112). The training and provision of formally qualified teaching personnel for the different sub-systems of the national

system of education in Cuba was closely linked to the pursuit of this outcome.[145] The long standing emphasis on upgrading teachers' qualifications continued, with RM 170/87 reaffirming the policy of raising teacher training qualifications and requirements in response to changing conditions and scientific-technical advances (Fernández 1987c, p. 126). The Resolution thus targeted teachers without tertiary level qualifications for special courses in the ISPs to gain Bachelor level degrees (pp. 127-28). Other initiatives, like the 'National Institute for Educational Retraining' (IPE – *Instituto de Perfeccionamiento Educacional*) sought to characterise and categorise existing teaching personnel, so as to more efficiently target them for retraining (see Pérez Pérez 1990). This concern for the constant raising of the level of teachers' qualifications, and by implication the quality of their teaching, was presented in terms of the need for better prepared graduates. That is, graduates able to develop and apply knowledge in the scientific and technological revolution, to benefit the nation's social and economic development (see Blanco 1995).

In the case of revolutionary Cuba, a major example of this world-systems human capital influence on school education has been the specific emphasis on 'technical and vocational' education, and more generally on the vocational formation and orientation of all secondary students. The world-systems influence impacted on this through the more favourable terms of trade and prices, in the world-economy, for value added manufactures, generally associated with core and semi-peripheral states. Under this broad imperative, the training of elite managers and planners, and high-skilled technicians to work in new industries, followed. World-systems geocultural notions of the capacity of secondary school education to effectively sort students into the associated differential types of training required by the developed national economy, and prepare all to effectively contribute to the development program, reinforced the trend.

[145] See Wong García (1987) for a Cuban historical review of the range of teacher training programs and strategies.

This influence is clear in Fidel's Central Report to the Third Congress of the PCC, in which he reiterated the official objective of strengthening the "work-study link in all its forms and at all levels of education," in order to achieve a better "vocational formation and professional orientation of students" (in Partido Comunista de Cuba 1986, p. 131). Similarly, in reference to the principles of Cuba's communist education, MINED's Rafael Bernal Alemany (1988) described the "need to increase production and the productivity of work as the basic premise for the construction of socialism" (p. 42). Statements like these provide strong ongoing evidence, into the late 1980s, of this world-systems influence with respect to the perceived role for secondary schools. With national economic development and growth entrenched as the "basic premise" of the socialist project, in line with the broad world-systems perspective, the emphasis remained on secondary schools promoting a communist formation that involved the best habits of "technical culture and labour efficiency," and linked school work to the "tasks of production and services" (Bernal Alemany 1988, p. 43).

Additional aspects of students' communist education presented by Bernal Alemany (1988), included teachers being called on to instil in students an understanding of the moral, political-ideological demands to be made on them as future workers, other demands related to work discipline, and the norms of the required quality and quantity of production (p. 43). Finally, under the principle of considering age and individual particularities of students in their educational paths, he stressed the need for teachers to be good examples of the type of workers and technicians required by the country, by being people who "love their profession" (p. 45). The world-systems geocultural influence over Cuba's socialist development project, and the perceived potential and intended role of secondary school in this project, conditioned this ongoing and predominant feature of Cuba's communist education.

Having stressed national plans for the social and economic development of the country for some thirty years, and invoked the responsibility of teachers and schools to prepare the required labour force with the corresponding skills, habits and attitudes to achieve this, such emphases in the late 1980s are not surprising. These perceptions of the role of the school, the emphasis on the technical and vocational sub-system, and the basic structures of secondary schooling and procedures for assessment, selection and

specialisation, were all firmly entrenched by this time. Linked to the world-system, these basic features were not challenged under the rectification campaign, but reinforced, given the economic situation of the country within the world-economy.

Thus Ministerial Resolution 232/88, for example, on the reform of the technical and vocational sub-system, streamlined the number of specialisations for qualified workers and intermediate-level technicians at the upper secondary level. These were brought down to some 80 specialisations in 10 fields (Fernández 1989a), compared to the 277 specialisations and 17 fields instituted in the late 1970s (see section in chapter IV on *Technical and vocational education*, p. 228). This type of reform did not constitute a shift away from the goal of vocational training, but was part of the broader focus in the rectification campaign on reducing bureaucracy and improving the cost-efficiency of labour and production. This was to be achieved through less labour demarcation, and the concept of *multioficio* discussed. The prevalence of such rhetoric throughout the world-system is again readily apparent. Hence RM 232/88 asserted the need to "form specialists with a broader occupational profile that permits them to better assimilate the new technologies that correspond to the development of science and technology" (Fernández 1989a, p. 122). In terms of the world-systems influence, it is clear that this reform extended the intended functional role of the school in preparing labour, now directed towards improving labour efficiency and productivity through the expanded "occupational profile" of the upper secondary level training.

Other trends identified in the research similarly remained. Thus, for example, Barriero Valcárcel (1987) continued to endorse the principle of work-study for secondary students, asserting that "in agricultural production plans and in the agro-industrial centres, [students' labour] represents a labour force of great importance for the economic development of the country" (p. 47). ESBEC students were cited as being involved in the production of citrus fruits, coffee and tobacco, all "important branches for exports and the acquisition of hard currency" (p. 49). Hence the translation of this world-systems influence in the Cuban context continued to involve the principle of work-study, and the schools in the countryside. In the context of the late 1980s, hard currency earning export commodities were targeted for students work, but the principle remained the same. The long standing influence, and entrenched models and concepts in

Cuba, thus allowed Barriero Valcárcel (1987) to assert that "The formation of a correct attitude towards work is one of the most important manifestations of the scientific conception of the world" (p. 48). Here too the objective of preparing labour based in the world-systems influence was directly stated.

Further developments in the period, reflecting this aspect of the world-systems geocultural influence, included the establishment of trade schools for students between the age of thirteen and sixteen who, for whatever reason, were not incorporated in the regular system of school education. Izaguirre (1987) notes that the trade schools were designed to "guarantee that the youth … with educational deficiency [*retraso*] are prepared for their incorporation into working life (p. 59).[146] As was intended for all students in all forms of formal education, students were to emerge from the trade schools with a "basic vocational formation that favours … students' acquisition of habits, abilities and knowledge of the most simple occupations demanded by the economic development of their location" (Izaguirre 1987, p. 59).

Similarly the recommendations for Education made by the first session of the Third Congress of the PCC in early 1986 had included efforts to ensure that graduates from school could "incorporate themselves in and contribute fully to production, services and teaching with greater speed" (Partido Comunista de Cuba 1986, p. 130). Going further, the Congress advanced ideas of "pre-assigning" graduates of technical and vocational education to the work force (p. 132), and more generally of:

> raising the quality of the preparation of qualified workers, intermediate and high-level technicians, and the quality and process of matching the formation of these specialists to the demands of the economic and social development of the country (p. 131).

[146] The Spanish word *retraso* translated directly as 'slowness,' 'backwardness,' 'underdevelopment' or 'deficiency'. In the context it refers simply to students who were behind, for their age group, in terms of formal school education. Given the baggage attached to the concept of educational deficiency in English, I use the Spanish word *retraso* in any subsequent quotes.

Once again the continuity in the rhetoric and assumptions about secondary school education is striking.

This broad focus reflected the constraints of the world-economy, ideological aspects of the world-systems geoculture of development, and within this the general world-system level consensus on the need and possibility for national economic development and the role of secondary schooling to achieve it. This conditioning influence was mediated and articulated in the historical context of revolutionary Cuba, still advancing a socialist development model to overcome underdevelopment. The continuity of this process is well illustrated in Martínez Pereiras's (1990a) description of the radical role of school education in revolutionary Cuba, in which he asserts a major role of school education in the economic achievements made to that point. To this effect he claims that any study of:

> the great productive achievements of recent years … will have to take into account the fact that the education system has not only allowed tens of thousands to graduate from university, and trained workers and intermediate level technicians in all branches of the economy, but has made possible the creation of a consciousness of producers in the new generations of Cubans (p. 5).

This type of assessment reflects the ongoing belief in and support for the policy objective, and the ongoing ways in which this was articulated in revolutionary or socialist political terms in Cuba. The continuity of both these features is no less striking.

By the time of the Fourth Party Congress, as the Soviet Union was in its final stages of disintegration, the PCC reaffirmed this long-standing belief and objective of the national system of school education. In a resolution on changes to the Party Program in light of the new world conditions, the PCC noted that:

> the Congress reaffirms the necessity of focus on quality … [in education, and that] … The basic goal is to train new generations of revolutionaries, education about work and for work, with strong technical and cultural training and profound political and patriotic convictions (p. 104).

The note on education concludes with the affirmation that "We will continue educating well-rounded professionals with the necessary practical skills" (cited in Reed 1992, p. 104). The fundamental continuity here is instructive, given the dramatic world political and economic context in which these statements were made. They provide strong evidence of a world-systems influence on this major focus of school educational policy, being articulated and translated in the forms of work-study, specialised post-compulsory sub-systems; and universal vocational preparation and orientation in revolutionary Cuba.

The world-systems geocultural influence: Socialising citizens and workers

The structure of secondary schooling

Chapters III and IV in particular stressed the conventional structure of Cuba's national system of school education, established and maintained under the Revolution. From the mid 1970s onwards entry into the multiple post-compulsory options was through competitive selection processes, beginning with the elite IPVCEs and extending into the system of national, provincial and municipal quotas for each sub-system, and particular specialisations within them. Students were ranked by their academic performance for possible entry into the post-compulsory quotas, and increasingly subject to special entrance examinations and assessment procedures for different courses at this level.

This basic system or model of school education provided evidence of the world-systems geocultural influence, and established the framework and structure in which the other aspects of this influence were articulated. They embodied the revolutionary Cuba variant of a universal, compulsory and public system to include the entire youth in the socialisation process, aimed at creating loyal citizens of the socialist state. The structures of examinations, and academic / vocational specialisation, embodied the Cuban belief and attempt to support plans for national economic development by preparing labour in secondary schools. The basic model justified selection and differentiation in school, in revolutionary Cuba, premised on its contribution to future economic efficiency, productivity, and the broad socialist development project. In this way, the fundamental structure and processes of the Cuban system reflected, and

continued to do so in this period, these main features of the world-systems geocultural influence.

The Cuban Report to UNESCO for 1985-87 reaffirmed the basic character of the system of specialised academic and vocational post-compulsory training. The MINED (1988a) document confirms that the three years of compulsory basic secondary education remained in place, for all students to "achieve a basic level of knowledge" (p. 8). Skills learned at this level were to provide the bases for subsequent specialisation, while the socialisation of all students at this level would contribute to their future incorporation into the workforce, their values and attitudes towards work, the state and society. A commitment to specialisation after this level similarly remained, via the various sub-systems and their institutions. The document outlined the continued selective specialisation within the sub-system of general polytechnical and labour education, with options after basic secondary being preuniversity institutes; the elite IPVCEs; special sports institutes (EIDEs); and vocational schools of fine arts (EVAs) (MINED 1988a, pp. 8-10). Noting individual entrance exams in particular post-compulsory centres like the IPVCEs, the statement added that entry into all post-compulsory specialisations continued to be regulated through a "regimen of ranking aspirants for the distinct branches of study, established in each of the 169 municipalities of the country" (MINED 1988a, p. 27).

Selection and competition between students, who were ranked according to their "academic evaluation and other aspects with reference to the general evaluation of students, registered in their Accumulated School Record" (p. 27), continued as a means of sorting students into hierarchical upper secondary options, conditioned by the planned needs of the economy and the perceived optimal or most efficient use of these human resources. Highlighting this approach to the differential structure of schooling, MINED (1988a) described the "responsibility" of the technical and vocational sub-system as being "to form the intermediate level work force required for the economic development of the country" (p. 12). In addition, goals of better linking study to the workplace, removing excessive or "non-fundamental" content from curricula, and emphasising the development of student "capacities and abilities," were set out for all of the sub-systems, in line with their general objective of "labour formation" (pp. 32-33).

This overall structure and focus was reaffirmed in MINED's (1992) submission to UNESCO, which described the broad objective of the national system in terms of:

> the development of [students'] capabilities, skills, and habits that allow them to carry on with subsequent studies and ultimately enter the work force with an adequate level of preparation (p. 2).

The system of post-compulsory selection, via student ranking, into the academic and vocational options remained as a basic feature of this labour preparation. The report for Cuban education over 1989-1992 also noted that the technical and vocational sub-system was to be better integrated to "production, service, and research centres," whilst the process of this labour preparation would promote students' "personality and their patriotic and revolutionary convictions" (p. 7). An even greater emphasis on the practical work component of a range of vocational courses was instituted, with for example forty three new agricultural polytechnical centres being established over 1991-92, in response to the emerging crisis in food production. Additionally, all school education institutions were called on to "seek solutions for the real problems existing in the environment where they work, that is, the school, the family, and the community" (MINED 1992, p. 27).

The Cuban submissions to UNESCO provide further evidence of a continued emphasis on the technical and vocational sub-system, in line with the world-systems influence on socialising citizens and workers in accordance with national economic development plans. Data from MINED's (1988a) document show that the number enrolled in direct vocational training had increased from 114 700 in 1975-76 to 334 800 for 1987-88. Students enrolled in the teacher training sub-system contributed a further 33 000 in 1987-88, the combined total for these being almost double the 204 500 students enrolled in preuniversity (p. 54). By 1991-92, the numbers enrolled in technical and vocational had fallen to 293 408 and teacher training to 20 760, these combined figures still being significantly in excess of 195 163 enrolled in preuniversity (Varela Hernández et al. 1995, pp. 105-6; MINED 1995a). These figures provide evidence of the world-systems influence on preparing labour for the socialist development project.

In addition to this, the MINED (1992) report provides figures on the numbers attending ESBECs and IPUECs, indicating that despite problems in achieving the objective of self-financing, the concept of secondary students doing productive agricultural work as a systematic part of their general education persisted. Thus some 91 900 basic secondary students were attending 262 ESBECs in 1991-92 (p. 3), constituting around 22.8% of all basic secondary students. Preuniversity students in IPUECs numbered 118 000, making up some 60.5% of all preuniversity enrolments in 1991-92.[147] The official aim of this organised work-study was to stress "activities aimed at technical training and vocational guidance" (MINED 1992, p. 4). Thus whilst at the level of basic secondary school education the proportion in ESBECs had dropped markedly, and the initially envisaged universal status for this type of basic secondary education was clearly abandoned, it continued with a focus on instilling work and vocational habits in all students. The schools in the countryside thus remained as a strategy to prepare students for life and work in the socialist state.

The basic structure of the Cuban system demonstrates continuity and commonality, in relation to world-system level models, with nine years common and general education, followed by academic or vocational specialisation and preparation. This basic model involved assumptions, structures and practices common across the world-system, and provided the structure, in the context of revolutionary Cuba, in which the conditioning world-systems geocultural influences were mediated. Secondary schools thus continued to be seen as playing an important role in the socialisation of citizens committed to and working for the socialist and communist project. This intended process was shaped by the world-systems influence, in that the conventional model of schooling pursued functional outcomes of instilling work related skills and attitudes, and a more general socialisation of patriotic members of the sovereign nation-state.

[147] Percentages are calculated using the MINED (1992) figures for ESBEC and IPUEC enrolments, and figures for total basic secondary and preuniversity enrolments in Varela Hernández et al. (1995). The percentage of basic secondary students in ESBECs had peaked at around 37% in 1976-77, before falling to the low thirties and peacking again in the mid-1980s (Kolésnikov 1983, p. 289; Leiner 1985, p. 35). From this point onwards, the proportion declined steadily, although high levels were mainained for preuniversity level.

Continuous improvement and basic secondary curriculum reform

The *perfeccionamiento* reform and restructuring process that began in the 1970s was fully implemented by the early 1980s, such that reform was characterised within Cuba under the banner of 'continuous improvement' (*perfeccionamiento continuo*). Turner Marti's (1987) description of this process clearly presents it as an extension of the established structures and principles, involving adjustments rather than qualitative change. Reform under this process included the streamlining of content in selected subjects, and the replacement of others, in line with the basic secondary and post-compulsory specialised model. The reformed subjects of the common component remained directed towards "the basic cultural formation of the whole population" (Turner Marti 1987, p. 9). Others that provided "fundamental knowledge that is required in higher education," for example, were moved from basic secondary to preuniversity level, whereas the new subject of civic education was included in year 9 in order to "systematise and deepen [all] students' knowledge of citizens rights and obligations" (Turner Marti 1987, p. 11). Here too the concept of basic skills for work, and basic knowledge and socialisation for good citizens, to be followed by specialised post-compulsory academic or vocational options, was further strengthened.

Also contributing to this, Hernández Báez (1986) describes the content of the common subjects of basic secondary education as having:

> a social function to provide students with the necessary basic knowledge, and develop their capacities, habits and abilities, required for their incorporation into the social and productive or working life of the country (p. 44).

In line with the policy of continuous improvement, Hernández Báez (1986) cites the need for the ongoing redefinition of what constitutes the "basic, common level of the content of subjects" (p. 45). The premise of the model and this content reform was clearly that, regardless of the specialisation taken after basic secondary level, the process and content knowledge of basic secondary was to provide a minimum level of preparation for effective workers and citizens. The specific reform of the content knowledge of particular subjects was thus aimed at better identifying the "fundamental

components … [that] … must be common in all the sub-systems of general secondary education" to achieve the desired outcomes (Hernández Báez 1986, p. 46).

A revised curriculum for general polytechnical and labour education was thus formulated, with the new and reformed subjects intended to improve the 'quality' of school education. Included in the Minister's ten principal tasks for the 1987-88 school year were calls to: ensure that all students "appropriate solid and in depth knowledge and develop [their] abilities and capacity"; raise efficiency and quality under the process of *perfeccionamiento continuo*; and guarantee a "more efficient ideological and professional formation of students" (Fernández 1987b, pp. 127-28). Similar goals were raised in a MINED (1988b) document on the continuous improvement process, with civic education to strengthen students "political-ideological, moral, labour and juridical formation," in combination with other subjects "educating students for work, preparing them for life" (p. 102). Ministerial Resolution 403/89 mandated that the new and revised subjects be introduced into the national system, accompanied with familiar statements about the "integral preparation of students" and a "basic instruction that prepares them for life" (Fernández 1989c, p. 3).

Assessment and post-compulsory selection

The establishment of a differentiated system of post-compulsory secondary education, with competitive selection processes for the different levels and types of academic and vocational training; and the implications of this for the assumptions of the Cuban system and world-systems influence, has been outlined above. This structure and process continued, based on notions of meritocracy and efficiency. Changes to student evaluation policies and practices further extended and formalised those already in place. In Ministerial Resolution 615/87 Fernández (1988a) described the system of student evaluation as being designed to "contribute to improving the process of teaching and learning and the checking of its efficiency" (p. 116). The Resolution set in place a general grading scale to be used across primary and secondary school.[148] In the context

[148] The grades were: 'Insufficient' (*Insuficiente;* 0-59 points); 'Good' (*Bien;* 60-79 points); 'Very Good' (*Muy Bien;* 80-89 points); and 'Excellent' (*Excelente;* 90-100 points) (Fernández 1988a, p. 116).

of Rectification, criticism of *promocionismo* and *facilismo* from Fidel, and calls for improved quality and standards, Fernández (1988a) presented the grading scales as better enabling teachers to measure whether students "acquire the knowledge and abilities called for in each case," (p. 116).

Ministerial Resolution 615/87 set out prescribed types of assessment task and their relative weighting for teachers to determine students' final grade. The methods relied heavily on partial and final examinations, with practical activities set for some subjects.[149] Promotion required that students receive at least the grade of *Bien* in all subjects, whilst 're-evaluation' (*revalorisación*) and then 'extraordinary' exams were planned, to give students who did not pass a second and third chance to be promoted (Fernández 1988a, pp. 119-20). All 'final' and subsequent examinations were set by different levels of the Ministry of Education, according to the year level, with the decisive exams for semester two of year 9 and year 12, being set by MINED's national office of general polytechnical and labour education (Fernández 1988a, p. 121). In 1989 control over the setting of common assessment tasks was simplified, with provincial offices of MINED setting all 'final,' 're-evaluation' and 'extraordinary' examinations for year 7-8 and 10-11, whilst the national office of MINED handled the more decisive exams for year 9 and year 12 (see Ministerial Resolution 216/89 in Fernández 1989b).

Most subjects involved a combination of 'Partial' and 'Final' exams, with each subject allocated to one of five assessment "groups," each of which prescribed a specific combination of tasks (see the details annexed in Fernández 1988a, p. 124). Mathematics, spanish and the sciences were prescribed a partial exam worth 40 points and a final exam worth 60 points; whereas Geography, History, English language, and the political subjects, were assigned two partial exams of 50 points each. The 'partial' exams were produced in-school, thus allowing for a degree of in-school rather than

[149] The Resolution eliminated teachers use of 'systematic tests' (*controles sistemáticos*) in calculating students' final grades, given their non-standardised nature. Teachers were encouraged to continue to use these systematic tests or checks as diagnostic tools for their teaching, whilst standardised numbers and types of 'Partial' and 'Final" examinations were prescribed to arrive at subject grades, on which decisions were based for students promotion and selection.

state-wide control, with examinations to be checked and approved by head teachers and vice-principals (see MINED 1989, pp. 3-4). Hence the resultant system was a combination of partial in-school evaluation, using mandated and regulated types of assessment tasks, and state-wide, centralised written examinations, particularly in the decisive transitional years and high status subjects of Maths and the Sciences.

The orthodox nature of this reform in student evaluation is further evidence of the world-systems geocultural influence over Cuba's secondary schools. A system of standardised and centralised academic examinations, to award grades and ultimately rank students against each other as a basis for selection into post-compulsory and post-secondary education and training, was far from a revolutionary break in school educational organisation. Indeed, Campistrous Pérez and Rizo Cabrera (1989) acknowledged that the reformed system of student evaluation was the result of a prolonged study of systems used in socialist and "non-socialist" countries, particularly in the case of the latter those with "well known prestige in education" (p. 17). Similarly, the rhetoric, assumptions and objectives of the approach, as a technical means of assessing the quality of school education, and an efficient method of selecting and allocating students to differential types of schooling; are strong indicators of a world-systems influence articulated in revolutionary Cuba.

CONCLUSION

This chapter characterised the social and economic context of Cuba for the 1986-1991 period, within which secondary school education and its development and reform was historically situated. Revolutionary Cuba in the late 1980s also continued to be aligned with the Soviet Union and economically integrated into the CMEA. Agreements within this organisation were influenced by conditions in the capitalist world-economy, whilst world markets, commodity prices and finance impacted directly on national policy and outcomes in Cuba. The operation of the capitalist world-economy thus influenced Cuba's project of socialist development, in conjunction with geocultural influences on the fundamental objectives, understandings, and strategies for achieving, national economic and social development on the island. These influences were mediated and articulated in the historical context of Cuba's socialist project, carrying

implications for the model of secondary schooling, its basic structures and organisational principles, and its essential functions in the state and society.

This chapter has stresseds continuity in the basic structures, organisation and intended objectives or outcomes of secondary schooling. Similarly, a world-systems influence over secondary schooling continued throughout the period, in a consistent way, with particular emphases in accordance with the particular historical conditions within Cuba. Thus for example, the worsening terms of trade, foreign debt, and commodity prices in this period acted to reinforce the priority of national development generally, and the intended role of secondary school education efficiently sorting and training students to contribute to this development in their working lives. As had been well established, specialised training determined in accordance with national economic planning, targeting a combination of new (value added) and traditional export industries, was a feature of this influence. A general goal of instilling disciplined work habits, and providing common or basic skills for all students followed by the specialised training, with an emphasis on technical and vocational education, was also extended. This reflected the world-systems influence on the national political economy, and on secondary school education.

The project of national social and economic development that had been established in socialist Cuba, struggled to achieve economic expansion, increased consumption, and the basis for their sustained increase by pursing industrialisation, the modernisation of industry, and improved terms of trade within the world-economy. New industries, organisations and state institutions had been established, structuring work within and between them in ways that directly impacted on the structure, content and practice of secondary school education. For example, the differentiation of labour that emerged between industries and occupations involved expert or professional managers running industries, and expert planners or technicians formulating policy and managing the national political economy. This in turn brought corresponding differential levels of, and specialisations in, secondary school education. Just as the forms of organisation in the national economy were presented as leading to greater efficiency and productivity, so too the differentiation and specialisation in school was cast as the most efficient means of training the required labour for the development project. This broad process

was not questioned in this period, suggesting a continued world-systems geocultural influence on secondary schools.

Alongside and related to this impact, ideas, assumptions, objectives, and models of secondary school education, dominant across the world-system, continued to be found in Cuba. As part of the world-systems geoculture of development, these features reinforced the underlying objectives of and belief in the (socialist) national development project, and the fundamental goals of secondary school education for the state, with respect to the socialisation and preparation of students through formal schooling. In the process of pursing these, familiar school structures, approaches to their organisation of subject content and its acquisition by students, were consolidated. The Cuban schools sought to instil identified universal, ethical values and attitudes in students, as essential for their effective citizenship within the state. Teachers were to be role models of the type of citizen desired, monitoring prescribed behavioural norms in students as measures of their internalising the desired values. Most critically, this process of socialisation invoked patriotic or nationalistic themes, with students to identify their interests with those of the nation.

This geocultural influence also involved ideas of the school functionally preparing the future labour force, for their effective participation in work. In this way, aspects of students' communist political education, and their general civic and citizenship formation, continued to involve things like attitudes towards work, and habits and values seen as conducive to their most effective incorporation into the labour force. The broad goal of socialising citizens thus involved citizens committed to the development project, and prepared to take their designated position in the economy to contribute to this project. This influence also acted to justify, and reinforce, the structure of post-compulsory specialisation, and the associated selective and competitive processes for allocating students into the various pathways.

In these ways, this chapter has demonstrated that over 1986-1991, the world-systems geocultural influence continued to condition fundamental objectives of school education in Cuba, and the structures to achieve these. The two main features of the world-systems influence: national economic and state citizenship goals, continued to characterise the Cuban system. In the context of the island's socialist development project, they were

consolidated as complementary features of the national system, good citizens being those who would work well in their chosen vocation, in the interests of national development. Indicative of the world-systemic nature of the influence, the socialist political project, and influence from the Soviet Union, reaffirmed these trends. As world conditions altered dramatically, and the socialist bloc of countries collapsed, the world-systems influence on secondary schooling remained relatively unchanged. Some specific reforms in response to the new conditions, like the shift to 'civic education' ahead of 'Marxism-Leninism,' resulted without changing the basic objective of socialising citizens loyal to the nation-state, prepared to contribute to its development. Given that the world-systems influence had conditioned secondary schools in Cuba over thirty years, this continuity is to be expected under the world-systems approach.

In conclusion, this chapter confirms the value of this approach, as a way of explaining how and why secondary schooling in Cuba developed the way they did. The combined and interacting economic and geocultural aspects of this influence are consistently identified in secondary schools in this period, in a way that is consistent with the model and structures of schooling established. In addition, the conditioning nature of this influence, constraining but not directly determining the specific forms, policies and practices in the historical context of revolutionary Cuba, is also reaffirmed. World-systems influenced objectives were articulated and translated in contextually meaningful ways.

POSTSCRIPT: CUBA AND SECONDARY SCHOOL EDUCATION SINCE THE COLLAPSE OF THE COMMUNISMS

This historical analysis of secondary school education in Cuba ends at this point, with the collapse of CMEA, the Eastern European socialist bloc, and imminent collapse of the Soviet Union. The implications of these events on Cuba have been widespread,

and are beyond the scope of this study.[150] With respect to a world-systems approach to school education in Cuba, the shifting world political and economic conditions clearly strengthened the potential world-systems geocultural influence, at least in the short term. That is, the common, world-systems premises and goals of Cuba's socialist development project, and its secondary schools within this project, remained in place. This influence may be in decline, as part of the Wallerstein's (1995a) identified end of liberalism as the dominant ideology of the world-system, and with it the legitimacy of the geoculture of development. In the short term, however, the basic assumptions and objectives of secondary schools in Cuba were unchanged, leaving work into the potential decline of the world-systems geocultural influence for other research projects.

The world-systems approach to explain the fundamental similarities of the system of school education, established by Cuba's revolutionary government, has set this convergence in the context of the shared goals and associated beliefs of national economic and social development, held by capitalist and Marxist-Leninist states. From this perspective, the collapse of the Soviet Union and the European socialist bloc does not mark the end of an authentic alternative to the capitalist world-system, but a symptomatic part of "the collapse of liberalism as an ideology" (Wallerstein 1995a, p. 62). For world-systems analysis, the collapsing legitimacy of liberalism as the dominant ideology of the capitalist world-system, and the associated discrediting of assumptions and programs for national economic development within this system, opens possibilities for its future transformation (see for example Wallerstein 1998; 1995b; Hopkins and Wallerstein 1996). These events, and potential anti-systemic challenges to the world-system, may well emerge in Cuba and other 'underdeveloped' states in the future.

[150] The analysis of these events, their implications, and the Cuban strategies to maintain fundamental political commitments to universal health care, education and general welfare and its political structure, has become a significant area of research in its own right. Some general texts addressing this include: Martínez Heredia (1995a); Carranza-Valdéz (1995); Bengelsdorf (1994); Bunck (1994); Eckstein (1994); Pérez-López (1994); Schultz (1994); Baloyra (1993); Mesa-Lago (1993a); Pérez-Stable (1993a).

In the immediate response to the "collapse of the Communisms" (Wallerstein 1995a, p. 62), the Cuban government has been confronted with the critical socioeconomic consequences of these events on the national development project. At least for now, this response has involved a revised program for national development, through the now unavoidable, full integration in the world-economy (see Lage 1995). These conditions strengthened the perceived need for national development, as a matter of survival within the world-economy, and in turn the influence of geocultural ideas of efficiency, productivity and national competitiveness as the basis for survival and development. Thus the influences on secondary school education, identified in reference to the fundamental similarities of the system over the preceding thirty years of Revolution, continued. Secondary schools in the 1990s continued to be directed to preparing citizens and workers for the state and its development project.

The world-systems geocultural influence continues in the immediate term in Cuba, mediated in the national context of an ongoing commitment to the socialist project, or at least to maintaining a base level of the social services and government ownership achieved since 1959 (see Reed 1992). The new conditions have heightened the push within Cuba for familiar world-system demands on (particularly 'developing') nation-states, including the increased competitiveness of national export industries; reduced subsidies for state industries; efforts to attract direct foreign investment and capital; reductions in social services; and general domestic austerity measures. Political and ideological uncertainty and contradictions have emerged, compounded by the impact of economic reforms and restructuring, generating levels of socioeconomic inequality, unemployment and uncertainty not seen since 1959 (see for example Blanco 1995; Martínez Heredia 1995a; Pastor Jr and Zimbalist 1995b; Pérez-López 1994; Domínguez 1994; Eckstein 1994; Baloyra and Morris 1993; Pérez-Stable 1993a; Halebsky and Kirk 1992).

Amidst this uncertainty, and the ongoing problems in achieving the desired national social and economic development, the world-systems influence on secondary schools persists. The island is now completely dependent on the capitalist world-economy for trade in essential goods, finance through international credit institutions, and the direct participation of foreign capitalist enterprises in the national economy. In this context,

the geocultural influence persists with secondary schools still presented in formal policy as an strategic part of the preparation of citizens and skilled, efficient workers. The broad structure of the system was essentially unchanged, with new emphases and post-compulsory specialisations emerging, as they had done in the past, in response to national priorities and strategies for economic development. The emphasis on national history extended, along with a shift in policy rhetoric away from Marxism-Leninism to Cuba's national hero Jose Martí, as part of the socialisation process of citizens and workers for the socialist state in the 1990s.

Some evidence of this continuity in secondary school educational development and policy is evident in recent Ministry of Education documents. For example, MINED's (1995b) prescribed guiding principles for the 1994-95 school year, reaffirmed the principles and specific strategies for students' "labour formation" as a part of the mainstream curriculum and subject programs. The document also stressed the teaching of Cuban history and activities for the commemoration of Jose Martí. Teachers were called upon to model exemplary revolutionary behaviour, values and attitudes, leading discussions on the daily political, economic and ideological problems confronting the country and concrete activities to overcome them. Work-study remained as a "basic principle" of education, with the formative objective of developing students' political consciousness as producers; and an economic objective of students directly participating in national production and social activities (MINED 1995a, p. 12).[151]

In the 1990s Cuba's sub-system of general polytechnical and labour education continued to formally promote students "integral formation" (MINED 1995a, p. 23), that included the full range of citizenship and work preparation objectives. The post-compulsory sub-system of technical and vocational education similarly retained its goal to "prepare the qualified labour force required by the country for its economic and social development plans" (MINED 1995a, p. 25). MINED's (1995a) report reveals that

[151] Five "basic principles" of education were identified in the MINED (1995a) statement, the other four being: 1) universal access to education; 2) popular participation in educational activities; 3) coeducation; and 4) free education.

the basic curriculum for General education remained essentially unchanged (p. 47), whilst Ministerial Resolution 216/89 on the evaluation of students remained in force (p. 48). Similarly, the process of selective entry into the various types of post-obligatory school education, particularly the IPVCEs, continued (see Varela Hernández et al. 1995, pp. 23-26 and 53-58).

Popular support for, or consensus around, the world-system model of education as an integral factor in the plans and strategies for national economic and social development, may have already weakened since 1989-91. In the context of the economic crisis imposed by the collapse of the Communisms, and the Cuban strategies to recover within the capitalist world-economy, Cuban sociologist María Isabel Domínguez notes a reduced "mass aspiration" amongst the youth to study at University level, whereas this had once been an almost universal goal (cited in Blanco 1995). As divisions on the island increased based primarily in the dual U.S. dollar and national currency economies, with many key goods only available with hard currency, Valencia Almeida (1995) noted that "the pyramid of values is inverted" as people realise their remuneration is not necessarily linked to either the social value of their work, or their level of education and training (p. 2).[152] There is a clear potential for this context to destabilise notions of investing in education as a strategy for future national development, particularly as ongoing problems in achieving national development are likely to remain within the world-economy.

Wallerstein (1995a) argues for the collapsing legitimacy of liberalism as the dominant ideology of the world-system, particularly within the so-called Third World as the promises of national development prove to be largely unattainable within the world-system. Amidst this process and the signs of growing contradictions within Cuba in relation to school education, the ongoing world-systems influence on formal school educational policy remains. This is consistent with Wallerstein's (1995a; 1998) analysis

[152] This last point is implicit in the analysis of Valencia Almeida (1995) and others highlighting the proportionally high wages potentially received in relatively unskilled occupations such as taxi driving, or indeed anything related to the tourist industry, compared with, for example, a highly trained doctor receiving a salary in the national currency (see Pastor Jr and Zimbalist 1995a; 1995b)

which views the collapse of liberalism as a potentially slow process of disintegration and transformation of the capitalist world-system, pressured by its lack of legitimacy amongst populations. This process of the breakdown of the capitalist world-system brings the loss of legitimacy of its geoculture of development, and the associated assumptions with respect to possible development for all sovereign states within the world-economy. It is within this context that an authentically unique or exceptional alternative model of secondary school education might emerge, as these influences are increasingly questioned and challenged. This might, in turn, lead to a model of education that promotes an authentic, anti-systemic alternative to the capitalist world-system, in the process of its gradual disintegration.

This potential, however, has not yet translated into practice for the revolutionary government in Cuba, in that public, secondary school education continues to be presented in the identified, familiar terms. The world-system level goal, and promise (hope), of national development, continues to legitimise and shape secondary school education, such that the persistence of liberalism seems to characterise the contemporary period, regardless of whether these objectives can be realised.

In conclusion, the events of 1989-91 and beyond have unquestionably had significant implications for the political economy of Cuba, forcing economic change, the introduction and extension of capitalist mechanisms and features into the domestic economy, and full participation in the capitalist world-economy. Continuity in basic policy objectives related to social and economic development, through national economic planning and the maximisation of national benefits in international trade, supports the world-system perspective. That is, world-economic pressures, and the associated ideology of liberalism and geoculture of development, promoting and reinforcing the basic goals, and the role of school education in their realisation. Continuity, for now, in the goals of preparing citizens for social and political stability, and national economic development, persists under the world-systems perspective.

Chapter VI:
Conclusion

OVERVIEW

From the triumph of the popular Cuban Revolution in 1959, extending into a radical social revolution pursuing authentic political and economic independence for the island, conditions seemed to favour the development of something exceptional in school education. Planning the general expansion of state provided school education, the government acknowledged the inherently political role of the school, and declared its intention to use the institution to consolidate public support for and participation in the Revolution. The politicised reforms included: the popular literacy campaign; the nationalisation of all education and its massive expansion to provide equal and universal access for all citizens; the incorporation of socialist and communist political content, and productive work, into schools; and the general policy commitment to the communist formation of students. These goals and reforms were clearly not characteristic of dominant model of school education in capitalist countries, and hence supported the development of something exceptional to this dominant model in revolutionary Cuba.

The historical analysis of the substance of these reforms and their practice, in the context of more conventional citizenship and human capital objectives for the expanded system, however, shows that the Cuban model of secondary schooling that developed was fundamentally similar to that found in any capitalist country. That is, despite the potential for and expressions of an alternative or revolutionary model of school education, the fundamental assumptions about secondary schooling proved to be in line with those found in capitalist countries across the world-system. These included the social and economic roles and functions of the school, and its basic objectives, structures, organisation and practices to achieve these. Three years of basic secondary school education, in age and subject based classes with specialist teachers imparting content knowledge, was followed by vocational or academic specialisation in upper secondary level. The schools sought, above all else, to prepare the future labour force required for the project of national economic development. Familiar processes of

competitive testing for selection and sorting, in the name of efficiency and meritocracy, emerged. The result, as observed by Marí Lois (1995), was fundamentally the same as that found "in any capitalist country" (p. 8).

The historical process that led to this non-exceptional model of secondary schooling being established in revolutionary Cuba, was explained in terms of a world-systems geocultural influence on the process. The world-systems approach explains the familiar features of the Cuban system. In short, the approach combined the influence of the capitalist world-economy on the island, and associated geocultural assumptions and influences with respect to national economic development, the role of school education in this process, and more specific aspects of school organisation. This provided a world-system level influence that conditioned the formulation of policy, and the basic model of secondary schooling established, in the historical context of revolutionary Cuba. The influence was felt in two main ways: 1) the centrality of national economic development to the socialist political project, based in the relative underdevelopment of the country within the capitalist world-economy and problems achieving 'development'; and 2) related geocultural assumptions about the socialist project, and how to achieve socialist development, with particular implications for secondary school education.

The world-systems geocultural influence on secondary schools in Cuba reinforced the belief in, and intended objective of, the secondary school being articulated with and directly supporting plans for national economic development, by preparing skilled and specialised labour. These objectives came to define students' political formation, with corresponding goals of socialising citizens in patriotic and civic values and attitudes, including a commitment to work for the nation's development. This influence shaped the major objectives of secondary school education, and assumptions about how these could be realised, from the structure and organisation of the system down to pedagogical practices of student assessment and allocation to differential types of training. In the historical analysis, the world-systems geocultural approach provides a strong framework for explaining this development over time, and accounting for the convergence of revolutionary Cuba's secondary schools with those in capitalist states of the world-system.

The conclusions of this research are set out in three parts. The first part summarises the historical evidence presented in the substantive chapters of the research. That is, evidence of the non-exceptional character of Cuba's secondary schools, and the world-systems geocultural influence in national policy and institutional structures and practices to explain this convergence. This is followed by a summary of the broad arguments or thesis developed in the historical analysis, outlining the world-systems geocultural approach to secondary school education in revolutionary Cuba. Finally, the implications of the research are discussed, in terms of both work on Cuban education and more broadly for the field of comparative education. Some potential areas for future research are set out, based on this work.

THE DEVELOPMENT OF SECONDARY SCHOOL EDUCATION IN REVOLUTIONARY CUBA, 1959 - 1991: A WORLD-SYSTEMS GEOCULTURAL APPROACH

The historical development of secondary schools

Chapter I outlined the early, explicit politicisation of school education by the revolutionary government in Cuba, both prior to and after the public commitment to building socialism and communism on the island. Policy initiatives and reforms corresponding to the radical political rhetoric were identified, including the mobilisation of the population to overcome illiteracy in the aptly named 'year of education' in 1961. The predominant feature of the early period, however, was the nationalisation of all education by the state, and the massive expansion of the system of school education. School education in Cuba moved from a system in which many people were effectively denied access to school education, based on their socioeconomic status, to one in which access to school education was extended to the whole of the population. The whole process was politicised, as former military barracks were converted into primary schools, emergency teacher training programs were established, and the revolutionary government put unprecedented amounts of state resources into public school education.

In this early period, and the radical politics of the mid-1960s as Cuba struggled to maintain political independence amongst the socialist countries, signs that the expanding system was drawing on world-system level assumptions and models began to

emerge. The basic 6+3+3 structure of the national system, and the combination of economic and political objectives for school education, were established. World-system level beliefs and assumptions about the role of mass public education to prepare human capital, with a future return for the national economy, were identified in formal Ministry of Education policy. These included goals of emulating proportions of trained personnel found in OECD countries. The socialisation of new socialist citizens in the new schools, was also tied in these early years to the broader project of socialist (national) economic development, with citizens committed to and prepared for the development project. In this way, I argued that the basis for a conventional model of secondary schooling, aimed at preparing skilled and patriotic citizens and workers, was established.

Early development in revolutionary Cuba thus outlined the ways in which the country's underdevelopment within the capitalist world-economy, combined with geocultural assumptions of the world-system, to influence the basic features of secondary school education. These tendencies continued as the island experienced social political and economic turmoil in the 1966-1970 period, dealt with in chapter II. Conditions confronted by the small, isolated island, pushed the leadership towards economic and political alignment with the Soviet Union and socialist bloc, in an attempt to provide greater certainty and efficacy in its socialist development plans. In secondary school education the principle of work-study was entrenched, along with the first schools to and in the countryside, as the principal means of contributing to students' communist political formation. Corresponding values of international solidarity with anti-imperialist and national liberation movement, and a consciousness of a producer (for the social good) rather than consumer, were incorporated into formal policy and pursued through the practice of work.

In the context of economic crisis, however, the development in secondary schools in this period simultaneously reinforced and extended the approach which saw this level of schooling primarily as preparation for working life, and hence for a contribution to national development. Students from secondary schools were used in strategic national economic tasks, most notably the lead up to the attempted ten million ton sugar harvest of 1970. The Ministry of Education presented secondary schools, including those in the countryside, as providing work related skills, and socialising students into a 'love for

work' and commitment to the economic expansion of the country (MINED 1967c). Building on this, the approach of specialised training in secondary school, increasingly (though not exclusively in this period) at the upper secondary level, was endorsed, with a particular emphasis on 'technical and vocational' training noted from the literature. The link to world-system level models of secondary schooling was highlighted, through the structures, beliefs and intended outcomes of secondary schooling.

Chapter III covers the period of institutionalisation of the Cuban Revolution, in line with the close political and economic alignment with the Soviet Union, and integration into the CMEA, put into place in the early 1970s. This context brought a more formalised and systematic attempt to educate the youth in official 'Marxism-Leninism' in schools, with the incorporation of specific political subjects, and an attempt to have all subjects incorporate the official political line. National economic recovery was reviewed, based on the conjuncture of favourable world market prices for Cuban commodity exports, and more stable aid and trade with the Soviet Union and CMEA. The impact of the world-economy on the national context was shown to have remained significant in the context of Soviet alignment, the latter affirming the goal of creating the material basis for socialism (and later communism), and an orthodox strategy of financing the national development project through the export of primary commodities on the CMEA and world markets.

With the economic expansion and development aspect of the political project given even greater emphasis in this context, the world-systems geocultural influence on secondary schooling was seen to consolidate. Work-study and the schools in the countryside were to develop in all students desirable attitudes towards work, whilst greater specialisation at the post-basic secondary (now post-compulsory) level was intended to improve the future productivity of students as workers (Castilla Más 1972a). Selective and hierarchical upper secondary education was established and endorsed under the national improvement or *perfeccionamiento* plan, justified by the 'socialist principle' of economic efficiency through differential remuneration for different work. Elite upper secondary schools were built, and the sorting of students into a range of alternative post-compulsory training options, so as to make the most efficient use of these human resources, was a major feature identified in Cuban policy. The

unambiguous raising of the labour training role of secondary schools to central policy status, in this differentiated form, confirmed the world-systems influence over this process.

Covering the 1976-1985 decade, chapter IV reviewed the extension of market style reforms in the national economy, under the SDPE and Soviet influence, endorsing concepts of labour differentiation and specialisation for efficiency, including an elite level of political and economic managers. National economic performance remained inextricably linked to the world-economy, with commodity prices and increasingly foreign debt impacting on the national context. This influence was seen to impact on secondary schooling, with increased spending on the technical and vocational sub-system, tied closely to planned labour force requirements and a general emphasis on the "vocational formation and professional orientation" of all students (Partido Comunista de Cuba 1981, p. 425). The primary function of the secondary schools was identified as training qualified workers or intermediate-level technicians in the technical and vocational sub-system, and sorting other students onto the academic and professional track, through the preuniversity institutes.

Political subjects remained in place, and were accompanied by efforts to include PCC documents and materials in all subjects, across all sub-systems (Fernández 1977d). The patriotic aspect of this socialisation process was emphasised, such that the communist formation of students came to be defined in terms of students' civic or patriotic response to the demands of the socialist economic development project (Miranda 1984). It involved an intolerance for alternative interpretations of Marxism-Leninism, and hence firm and demonstrable allegiance to the Party, the socialist state, and its plans for the country. In this sense, the world-systems geocultural influence over secondary education in Cuba was expressed in terms of the ongoing economic, labour training aspect, and the attempted formation of good citizens for the state. Specific policies and reforms indicative of the world-systems influence included: refinements to the assessment and selection procedures for upper-secondary level education; orthodox class structures and teaching methods to impart and assess students assimilation of content knowledge; a faith in 'progress' linked to Maths and Science; and an emphasis on 'correct' student behaviour.

By the time the rectification campaign began in 1986, there was little doubt that Cuba's revolutionary secondary schools shared similar objectives and structures, and were based on similar principles and objectives, to systems found across the globe. This convergence was clearly linked to the island's program for national economic development within the world-economy, and the associated assumptions and objectives for school education in nation-states across the world-system, contributing to the socialisation of citizens and workers for the state. Economic crisis in the mid 1980s, marked by hard currency foreign debt, unfavourable terms of international trade both within the CMEA and on world markets, led to the rectification campaign that invoked socialist renewal, criticising some market reforms as well as corruption and the abuse of privileges. A program of domestic austerity brought some recovery, before the collapse of the CMEA and Soviet Union imposed emergency conditions on the island.

In this context, the world-systems geocultural influence on secondary schooling was outlined in terms of the continuity and extension of established trends. This continuity, despite the domestic turmoil and reform associated with the rectification campaign, highlighted the nature of the world-systems influence shaping the basic premises and major objectives of secondary schooling. In this period then, the emphasis on vocational training continued, extending in line with world-system level rhetoric into the need for 'multi-skilled' labour (Fernández 1989a), with a good attitude towards work and targeting hard currency earning export industries. Selection and streamlined post-compulsory specialisation continued, under the banner of continuous improvement, while the world-systems geocultural influence was also seen in the inclusion of 'civic education' and ongoing attention on students' 'formal' education, both promoting ethical values and attitudes required by effective citizens of the state. The objectives of secondary schools, and basic structures and procedures to achieve them, thus remained fundamentally unchanged, reflecting a model of and assumptions about secondary schooling that was clearly based beyond revolutionary Cuba's national boundaries, in the functioning and hegemonic ideology or geoculture of the world-system.

The world-systems geocultural approach to secondary schooling in revolutionary Cuba

Education generally, and secondary school education in particular, featured strongly and consistently in the revolutionary government's expressed political, cultural and economic project to radically transform the island, and construct socialism and communism in Cuba. Throughout the revolutionary period studied, the national objectives for revolutionary Cuba's secondary schools were closely tied to plans for national economic development. That is, they were tied to plans to catch-up to the levels of 'development' and consumption, of the so called developed and industrialised core countries in the world-system. At the same time, schools were also seen as a potential site for socialising new generations into supporting and actively working for the revolutionary, and socialist, political and development project. The world-systems geocultural influence on Cuba's schools emerged, in the historical context, primarily through policies and reforms based in expressed *national political* and *economic development* objectives.

Conventional school structures, based on geocultural assumptions about schooling, were established to pursue the world-systems related national objectives. Hence the model of three years of free and compulsory, common basic secondary education, followed by academic or vocational specialisation in upper secondary level preuniversity institutes, or polytechnical schools or institutes, was identified as evidence of this conditioning influence. The world-systems geocultural influence, and assumptions, thus underlay the basic structure of the system, as an efficient and effective means of preparing the required citizens / labour force required for national economic development.

The political objectives of Cuba's secondary schools, and the policies and reforms put in place to achieve them, connected to the world-systems geocultural influence in two main ways. Firstly, in the context of the plans for national economic development having a high priority or status in socialist political project, these plans consistently and increasingly shaped the definitions and expressions of the political objectives of secondary school education. Thus qualities or values identified as part of students' communist formation included attitudes and habits related to work, like discipline or

punctuality. Secondly, in a related way, the political objectives of secondary schools consistently involved socialising students who accepted their rights and responsibilities in the socialist state, including their responsibility to work; and at least in part identified their personal interests with those of the nation. In the process, goals of patriotism, political loyalty, and social stability (norms of 'socialist coexistence') formed part of these objectives.

As the review of the historical chapters makes clear, to explain the model and character of secondary school education established in revolutionary Cuba, a synthesised world-systems geocultural approach was used. This approach or framework had three distinctive features in the Cuban study. First, the impact of the capitalist world-economy on Cuba was broadly assessed, in terms of Cuba's location in the periphery of the world-system and the implications of this situation for the relative level of economic 'development' of the island. This level of world-system influence contributed to the priority given to national economic development in the Cuban revolution's political project, with specific and direct implications for secondary school education.

Second, using a broad interpretation of Wallerstein's (1992b) concept of the 'geoculture' of the modern world-system, this geocultural influence was described and identified with respect to the socialist project, and secondary school education. The compatibility of these two aspects of the world-system level influence was stressed. In the case of secondary school education, the geoculture of development reinforced the intended economic role of the school, the belief in its potential to fulfil this role, and in the process the emulation of dominant models of secondary schooling in the pursuit of the development objectives. This broad geocultural influence was extended to include aspects of a 'world culture' impacting on the development of school education in the nation-state of Cuba, primarily the goals of socialising citizens of the state through compulsory state education. In the case of Cuba, the interrelated nature of these with the development goals was highlighted, in terms of the type of citizens, their values and attitudes, sought in formal secondary school policy.

Thirdly, the world-systems geocultural approach outlined the nature of this influence, and the ways that this conditioned or shaped events in the national context. In this way,

policies and reforms specific to Cuba were identified and accounted for, often showing signs of the world-systems influence, but articulating or 'translating' this in a way that was meaningful and politically and culturally legitimate in the historical context. The world-systems geocultural influence thus explains convergence with models of secondary schooling in significantly different political and socioeconomic contexts, without excluding the potential for specific national interpretations to develop.

Secondary schools and the influence of the capitalist world-economy

Cuba's relative underdevelopment at the time of the Revolution was tied to its location in the periphery of the world-economy, being exploited by the core countries through unequal exchange. This was based in Cuba's dependence on the export of agricultural commodities, especially sugar, to finance the import of value added manufactures. A key part of the revolutionary government's project, and popular legitimacy, thus lay in its expressed objective of breaking definitively with these unfavourable trade arrangements, primarily through the development, modernisation and industrialisation of the national economy. In this way, Cuba's underdevelopment within the world-economy acted to promote and legitimise the revolutionary and socialist objective of accelerated national social and economic development.

This influence of the world-economy over the revolutionary political project and policy framework, helped to entrench, largely without question or debate, central goals of national economic and social development in Cuba. Similarly, the definitions of such objectives was not questioned, with notions of 'growth,' 'industrialisation,' 'modernisation,' and the application of 'science and technology' appearing regularly in public policy. Cuba's full integration into the CMEA from 1972 onwards provided some protection from the full, negative outcomes of trade and development within the world-economy, primarily through long term trade agreements at more favourable prices, direct aid, low interest financing of trade deficits and specific economic projects. Additionally, state ownership and control of industry and trade facilitated a more equitable distribution of wealth and resources domestically, overcoming the more extreme stratification of impoverished peripheral states. Even under these conditions, however, Cuba continued to experience the influence and constraints of the world-economy. This occurred via the persistence of generally unfavourable terms of foreign

trade, difficulties developing core like industrial activities, and the impact of world market commodity prices and foreign debt on national plans.

In this context of the world-economy, throughout the 1959-1991 period, revolutionary Cuba pursued familiar strategies for a peripheral state pursuing development goals. These included at various stages import substitution, rapid industrialisation and diversification of the national economy, and plans for more gradual industrialisation financed by the export of targeted agricultural commodities. This broad level influence had an impact on secondary school policy and structures in Cuba, via the constraints on the national economy. Official secondary school policy was explicitly linked to plans for national economic development, in the conditions of the world-economy, such that the relative national 'underdevelopment,' within the world-economy, entrenched this intended function of secondary schools.

The broad influence of the world-economy on Cuba and the socialist project, helped to legitimise and reinforce policies intended in part to provide all students with basic skills transferable to the work place, via the system of three years of general, basic secondary school education. Similarly, this influence supported the seemingly contradictory policy, in socialist political terms, of first dividing post-compulsory options into academic and vocational sub-systems, and then creating highly selective, elite preuniversity institutions within the academic, upper secondary sector, intended to more comprehensively and efficiently articulate secondary school education with national economic planning. The development imperative also legitimised the policy of work-study, giving school students direct work experience, ideally in their vocational path as in the case of polytechnical school students, or else more generally in agricultural work as in the basic secondary and preuniversity schools in the countryside.

Taking this level of conditioning of school education policy further, the approach identified the link between the (socialist development focused) structuring of the national economy and labour force, and the conventional model of differentiation and specialised training in secondary education, and by implication the associated processes of selecting students for these. The socialist development project and strategies explicitly involved efforts to maximise the efficiency, productivity, and hence profitability and competitiveness of national industries, as a basis for sustained

economic development. In this context, expert managers, planners and technocrats were trained and installed to oversee the development project, guided by a concern for the most rational and efficient use of human and material resources. This rhetoric, and thinking, became an entrenched part of secondary school policy and planning, aimed at preparing skilled workers, intermediate level technicians, and managerial personnel for the specialised positions in specific national industries. Students' personal, professional or vocational orientation towards their occupation was to be developed in the process, such that the very structure and broad intentions of secondary schooling was clearly intended to directly meet these economic functions.

The selection and differentiation processes used for this specialisation drew on conventional practices of academic testing, to evaluate students assimilation of content knowledge and determine their post-compulsory educational and subsequent career path. In this way, the impetus for national development and ever increasing rates of productivity and consumption, linked to the world-economy, provided the basis for the implementation of conventional systems of selection and sorting, based on meritocratic ideology, in secondary schooling. Alongside this vocational or occupational preparation, the system of secondary schooling was also intended to instil in all students a range of personal values, habits and attitudes identified as necessary for their full and effective participation in the work force.

These policy objectives were repeatedly and consistently identified, such that the influence of the capitalist world-economy extended into definitions of students' communist formation. These increasingly involved prescribed communist attitudes and values towards work. Communist formation came to include, amongst other things: labour discipline; a commitment to saving resources and improving productivity; a conscious preparedness to work anywhere in any field in service of the Revolution; and a general commitment to the project of increased production, development, and socialist distribution in Cuba. Critically, the dominant feature of the official, intended outcomes of secondary schooling, was one of comprehensive (skill and attitudinal) preparation and occupational allocation for the national labour force, as a function of the national economic development plans.

This influence of the world-economy on the goals and basic structure of secondary schooling in revolutionary Cuba was consolidated by, and simultaneously reinforced, world-systems geocultural influences on the appropriate model of secondary school education, and assumptions about its role and structure in the national context. The (geo)cultural conceptions about the need for and shape of mass school education, common to states across the world-system and seemingly independent of their specific political or economic level and structure (see Boli, Ramirez, and Meyer 1985; Boli and Ramirez 1986; Ramirez and Boli 1987; Meyer and Hannan 1979; Meyer 1980, 1994; Meyer et al. 1997), emerge as consistent with the influence of the world-economy.

Secondary schools and the world-systems geocultural influence

The relative underdevelopment of the Cuban national economy, within the capitalist world-economy, helped to promote and legitimise the Revolution's central objectives of realising national economic growth and development, and in turn the assumed role of secondary school education contributing to this project. The historical review of policy documents and internal statements and literature about secondary school education in revolutionary Cuba, confirmed the depth of the assumption amongst policy makers that secondary school education could directly contribute to economic development plans. Similarly, it confirmed their apparent intention to apply it to these purposes, and the resultant models and practices of secondary school education established for these purposes. In this way, the world-systems geocultural influence was seen to have consolidated and extended the identified objectives and models of secondary school education in revolutionary Cuba.

This influence over Cuba's secondary schools included the identified objectives of socialising effective and politically loyal citizens through the process of secondary schooling, something shared with other states in their expansion of mass school education (Boli, Ramirez, and Meyer 1985; Meyer et al. 1997; Ramirez and Boli 1987). These identified outcomes and influences on the process of establishing and extending mass secondary school education in revolutionary Cuba, are compatible with the geocultural concept. In the case of Cuba, this compatibility was confirmed by the emphasis on socialising citizens to participate in the national project of economic development. The geocultural influence thus included objectives of preparing skilled

workers, and simultaneously loyal and patriotic citizens committed to the national political project.

The world-systems geocultural influence on secondary schooling also emerged from a broader perspective, via the influence over the socialist political and economic project in revolutionary Cuba. This included an influence over the basic social and economic objectives of national development; the concept of state sovereignty within the interstate system; the belief that national economic development was possible; and the belief that the application of science and technology could achieve the desired development. These geocultural influences contributed to the shaping of secondary school policy, while the socialisation of members of the nation-state involved these assumptions about the state and its development project. That is, the socialisation of students, and their preparation as effective citizens of the socialist state, occurred within this geocultural framework, such that a significant part of this ideal citizenship involved attitudes and values related to the state development project.

The geocultural influence or framework thus shaped objectives and intended outcomes of secondary schooling, which impacted on the actual structures and practices of schooling established. Additionally, the geocultural influence provided basic models from other countries within the world-system, directed to the same objectives and outcomes. It is here that the world-systems geocultural influence is firmly established as the basis for the non-exceptional character of Cuba's secondary schools. The influence thus accounts for, and is identified in: 1) the conventional model of basic and specialised post-compulsory secondary education; 2) age and subject based classes taught by specialist teachers; academic examinations to evaluate student performance and allocate students to vocational and professional pathways; 3) the belief that in the process schools would efficiently provide a skilled and trained labour force to contribute to national development; and 4) the belief that in the process schools would socialise effective and loyal citizens of the socialist Cuban state.

The 'conditioning' nature of this world-systems geocultural influence on secondary schooling occurred in several ways. The direct, imperative for national economic development, as a function of Cuba's location in the periphery of the capitalist world-economy, promoted development objectives and thinking for secondary schooling.

Secondly, the organisation of the national economy included the hierarchical specialisation of the labour force, directly impacting on the structure and organisation of secondary schooling. Thirdly, a range of geocultural beliefs and assumptions, associated with the world-systems geoculture of development, were included in the socialist political project with implications for secondary school education. These included the perceived need for a skilled and disciplined labour to maximise productivity and competitiveness on world markets; and the belief that education and training in secondary school education could provide this required labour force. Thus the objectives of social and economic development in revolutionary Cuba, the belief that they could be achieved, the perceived role of the secondary school in this process, and particular models and practices in secondary schooling, were all part of the world-systems geocultural influence.

Goals of national economic development were explicit in the socialist project of Cuba, and in the construction of a national system of secondary school education. The goals themselves contained world-system level assumptions and influences on the socialist project, tied to the underdevelopment of Cuba. The geoculture of development endorsed these assumptions, both about the possibilities for development and the role of secondary schooling in its achievement. Hence, in its attempt to support the development project, the model of secondary schooling sought to provide basic and specialised skills corresponding to the structure of the national economy and labour force requirements. It sought to socialise citizens committed to the socialist project, prepared and able to work effectively in its realisation. Political and citizenship formation became preparation for work, while work training involved discipline, patriotism and political loyalty. The combination of influences provided by the geocultural approach is needed to account for this process, providing the general or underlying principles and detail of specific policy details, as they occurred in revolutionary Cuba.

The world-system influence in the national historical context

In response to the potential criticism that a world-systems approach implies all actions at the local (national) level are determined by global economic and cultural forces, I argued that these world-systemic influences conditioned developments in the

specific, national, historical conditions. Broadly extending Roger Dale's (1987) argument that within a world-systems perspective national boundaries continue to account for national distinctions of "real importance" (p. 200), evidence of the particular national influence was identified, to outline the ways that the world-system effects were mediated and refined in ways that made policy meaningful and legitimate in the context of revolutionary Cuba. That is, a world-systems geocultural influence bringing a high level of convergence with respect to secondary school educational policy and practice, but played out in the national context in historically and contextually specific ways.

A basic feature or quality of the world-system approach is that the national conditions themselves are shaped by the capitalist world-system. For example, notions of the sovereign nation-state, the level of economic and social development, the structure of the national economy, the degree of modernisation, all as outlined above, are conditioned by the world-system. The world-systems approach is premised on this level of influence (see for example Wallerstein and Phillips 1992). Within this process, however, phenomena of: nations; national peoples; notions of a national culture and identity; Anderson's (1990) imagined communities; national movements and revolutions; and patriotism and nationalism, can and clearly have developed (Anderson 1990; Hobsbawm 1992; Balibar and Wallerstein 1991; Wallerstein 1983a, 1991a; Wallerstein and Phillips 1992; Wallerstein 1995a). Such phenomena are not excluded or denied by the world-systems approach. Instead, the identification of specific national features in the development of secondary school education in Cuba, provided evidence of the world-systems geocultural influence being translated in the revolutionary historical context.

Aspects of the Cuban system not readily found throughout the world included the incorporation of socialist political subjects into the mainstream curriculum; the application of the principle of work-study on an expanded scale with an explicit ideological (as well as functional) objective in mind; the consideration of student's 'political formation' as a part of the selection criteria for post-compulsory educational options; and most strikingly the attempt to universalise the system of secondary schools in the countryside with all students spending a significant part of each day involved in productive work. In all of these, evidence of the types of world-system influence

described were identified, but in a way that was clearly mediated by and made meaningful (and legitimate) in the context of revolutionary Cuba. Determining the extent of the influence is problematic, and to some extent irrelevant, the critical point being that both were at work and interacted to produce such policy outcomes.

To restate one of these examples, despite the seemingly unique nature of the push for schools in the countryside, these schools were clearly linked to the world-economy, by promoting the national development imperative that, in Cuba, involved a strategy of financing national development and industrialisation through agricultural exports. Additionally, world cultural objectives of socialising a loyal citizenry, and using schools to impart relevant labour skills for the national economy, were also present within the policy. Further, the realpolitik of the national political economy (linked to the world-economy) constrained the ability of the state to provide for the mass expansion of secondary schooling, and arguably initiated the policy as a strategy to finance this expansion. The policy was also influenced by the Revolution's political objectives of promoting a consciousness of producers rather than consumers in the youth, and politicising them through their direct participation in productive work. Connections with the ideas of Martí, and Marx, about the separation of mental and manual work, and theory from practice were articulated to further legitimise the policy (see Arias 1988; Barriero Valcárcel 1987; Mier Febles 1973; 1974; 1986). Finally, such political objectives took on an economic development character, in this case emphasising work discipline, and a 'communist attitude towards work,' pursued through students' organised experience of regular work in the schools.

In this way, the world-systems geocultural influence interacted with the national conditions to produce the particular structures and policies in Cuba's secondary school education. The world-system thus conditioned the educational response in revolutionary Cuba, through the existence of economic constraints and objectives, and associated geocultural ideas, goals and models. These system-wide influences interacted with the politics of the revolutionary government and the expectations and demands of the population. These in turn related to the particular pre-revolutionary experience in school education, and of course the expressed ideology and goals of the national (and then socialist) Revolution.

The world-systems geocultural approach to secondary school education in revolutionary Cuba thus explains its historical development, from 1959 to 1991. Above all else, it explains why revolutionary Cuba established a conventional model of academic and vocational secondary schooling, designed to prepare students for work and life and in the socialist state, and support the political program for socialist economic development. An approach focusing on the national political economy cannot fully explain this process, given the consistent and consequential impact of the capitalist world-economy over conditions and strategies pursued on the island. On the other hand the world culture approach cannot fully explain the historical expansion and development of Cuba's secondary schools, since it's world-system level perspective similarly excludes the influence of the world-economy over school education policy. The historical evidence for Cuba highlights the need to include these influences and processes in the analysis, and hence the need for the world-systems geocultural approach.

Evidence of the world-systems geocultural influence was developed through the impact of the capitalist world-economy on the island and its socialist development project, and the implications of this for secondary school education. Further support was found in the geocultural assumptions about and models for secondary schooling to meet the combined development and citizenship objectives. These were a constant feature of Cuban policy, statements and the actual structures of secondary schooling established on the island. Under the world-systems geocultural approach, and the conditioning influence on the socialist project and its system of school education, continuity of basic school policy over time was established, strengthening the conventional model of secondary schooling. The basic principles and detail of secondary school education in Cuba under this continuity, is historically explained through this approach.

Implications of the research

Work on education in Cuba

First and foremost, the research contributes to an explanation of the historical development of secondary schooling in Cuba. In the process, a framework is established with some potential to explain some of the contradictory outcomes of schooling in

Cuba, particularly those related to the more radical political objectives identified in this research. Problems in the political formation of the youth were consistently referred to by the Ministry of Education, the PCC and Fidel, with contradictions frequently cited within schools, and between the politics taught in schools and the experience of students outside of school. As noted, recent criticism of school education from within Cuba has supported the argument that a conventional system of schooling was established. Taking this further, it has suggested that in some ways this system contributed to current problems being confronted with respect to the political and social values of the youth.

The world-systems geocultural approach used in this work can potentially contribute to this current line of research about school education in Cuba, offering an historical perspective for contemporary developments. The research has identified and outlined the world-systems geocultural influence shaping the model of secondary schooling established in revolutionary Cuba. This could in turn be extended to, and combined with, work directed at identifying links between the structure and operation of the established system, and the identified contradictory outcomes of schooling in terms of political and value formation in students. This could potentially contribute to and expand the initial work being done in this direction (see Marí Lois, 1995).

In this way the world-systems geocultural approach might potentially contribute to explaining the contradictory outcomes of Cuba's schools, and their attempted communist formation of the youth. This would involve further and more detailed, micro-level research on the attitudes of current and former students towards schooling, their educational qualifications, motivations for their educational and occupational preferences, and the extent to which these were supported or challenged by their experience of school education. Additional work might elaborate on the potential ways in which the established structures and practices contradicted the expressed communist goals. This would extend Marí Lois's (1995) work, elaborating, for example, how the hierarchy of post-compulsory schooling, leading to differential status and remuneration, may have undermined the goals of students accepting any position in this hierarchy, based on their political consciousness and commitment to the collective project. The basis for work in this area is established by this research.

The research also provides a critical perspective for the historical account of education in Cuba, without either undervaluing or only concentrating on the impressive and ongoing commitment to its expanded access at all levels for all citizens. It provides a critical perspective that is politically progressive, through the focus on the capitalist world-system influence, and the implied need to make this analysis and elaborate authentically anti-systemic strategies and initiatives, as part of a broader contribution to the transformation of the world-system. The continued public critique of the capitalist world-system by Cuba's leadership, and its formal commitment to developing and promoting an alternative to this system, makes Cuba an interesting site for research on this project and its implications for school education. Here again, recent work from within Cuba suggests that the climate is favourable for such work.

Finally, with respect to the studies on Cuban education, and the more general field of Cuban studies, this research clearly supports an approach that analyses development in Cuba in reference to the world-system, in order to fully understand and explain its revolutionary history. Where other work has highlighted the pragmatic influence of the national political economy on revolutionary policy and history (for example Eckstein 1994), or else focused on the Soviet political influence on domestic policy (Mesa-Lago 1978; 1993b; Domínguez 1989; Baloyra and Lozano 1993), this research makes a case for a world-system focus to analyse and explain other areas of policy in Cuba's revolutionary history. The implication is clearly that the socialist project in revolutionary Cuba has remained within the boundaries of the capitalist world-system. Research in a range of areas to test this framework, and in the process its specific implications in the case of Cuban history, could take this further.

Implications for comparative education

In the research on Cuba I advanced a broad world-systems approach that synthesises world cultural and world economic, linking these within an interpretation of Wallerstein's 'geoculture of development' under the dominant world ideology of liberalism. The approach involved interaction between the world-system and specifically national influences and conditions, providing for identifiable national variations, within the broad limits or constraints established by the world-systems geocultural influence. This approach was used to explain the development of secondary

school education in revolutionary Cuba, 1959-1991, including its objectives and intended functions, structures, content and practices.

The case of Cuba thus carries some implications for world-systems approaches to school education more generally. These implications are necessarily limited, given the specific nature of this research, focusing on the development of school education in a single nation-state over time. Cuba does, however, provide support for a world-system level approach to explaining why secondary school education expanded historically within nation-states, and explaining particular features or characteristics of the model of schooling established in the national context. Similarly, the case study of revolutionary Cuba supports the world-systems geocultural approach, combining world cultural and economic aspects to account for the general objectives of secondary schooling, structures to achieve these, and underlying assumptions about the school and its role in the state and society. Clearly further research in other contexts is needed to test, and confirm, modify or challenge this approach.

The case study of Cuba also contributes to the value of the world-systems geocultural approach for explaining school educational convergence in ostensibly anti-systemic, socialist or revolutionary states. That is, providing an approach capable of explaining this contradictory feature of the socialist states – the essential similarity of their education systems to those in capitalist countries – based on documentary historical evidence. Given the expressed commitment to an alternative model of politics, and an alternative approach to the formation of the new generations, the national conditions or context alone is clearly insufficient for explaining this convergence in socialist states. Thus the basic premise of the world-systems approach is advanced: the need to approach the study of national phenomena in terms of the nation-state, and its institutions, being a part of the modern world-system, and influenced by its logic, processes, and dominant ideology and geoculture.

Explaining the development of secondary school education in revolutionary Cuba with a world-systems approach, can not claim to settle all of the major debates within the field of world-systems analysis. It can, however, make a significant contribution to some of the fundamental questions and points of debate with respect to world-systems analysis. The most apparent of these is the assertion within Wallerstein's world-systems

approach that, prior to the collapse of the communisms, the socialist states remained within and functional to the capitalist world-system. The analysis of secondary school education ahs highlighted some of the ways in which finance and trade within the capitalist world-economy continued to impact on Cuban domestic policy throughout the revolutionary period. Strong support is thus provided for the Cuban political economy remaining within the influence, and processes of the capitalist world-economy. From 1959 to 1991 Revolutionary Cuba continued to suffer from unequal exchange within the world-economy, sought national development through external finance and trade, and reacted to changes in the conditions and terms of trade within world markets.

The world-systems geocultural study of Cuba's secondary schools also contributes to world-systems analysis through its elaboration of the capitalist world-economy impacting on this particular area of domestic social policy. This highlights the value of including the analysis of the capitalist world-economy in the world-systems perspective, by describing its impact on national Cuban conditions, policies and options. The direct inclusion of specific economic objectives and strategies into Cuba's secondary schools, in response to the country's position and trade within the world-economy, affirms its conditioning influence over the supposedly sovereign and independent nation-state.

In addition, the research contributes to world-systems analysis through its support for the geocultural aspects of Wallerstein's description of the modern world-system, with Marxist-Leninist and liberal capitalist states sharing a geoculture of development under the ideology of liberalism. The Cuban case provided strong evidence of this level of shared assumptions within the socialist project, through the understandings and objectives of development and progress based in the application of science and technology. The experience of Cuba's secondary schools support the argument that the socialist project was essentially an alternative strategy to achieve the geocultural goals shared with capitalist states within the world-system. While not definitively settling these issues, this research does contribute in a meaningful way to the world-systems approach, highlighting the detail of this shared geoculture and participation in the capitalist world-economy.

Finally, the research can make a potential contribution to the limited work on world-systems approaches to education, and provide the basis for further work to consolidate

and promote the world-systems geocultural approach. By synthesising aspects of the world economic and world cultural perspectives, under the concept of Wallerstein's (1992b) geoculture of development within the capitalist world-system, the major aspects of these significant world-system level perspectives are brought together in a productive way. The world-systems geocultural approach highlights the interrelated nature of world economic constraints and world (geo)cultural phenomena and processes, the combination of which constrain and influence the events, decisions and policies that take place in the national historical context. In the contemporary context of the "end of liberalism" as the dominant ideology of the capitalist world-system, and hence the increased potential for anti-systemic movements to emerge that reject and seek to transform the current world-system in a politically progressive way, continual reflection and discussion on the nature of the world-systems geocultural influence is required. I hope this work contributes to putting this issue on the agenda of comparative and historical, political work.

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