

**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 Sartre (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 Educativo 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 Popular*) 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 meetings 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 reinvoked 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 Robinson (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 “legitimizing 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 approach 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 industrialisation 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 allows for a specifically national context interacting with world-systemic 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 Félix 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 Félix 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 too 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 acknowledged 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 pursuing 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.