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The Cuban educational system in transition: Is it still an alternative for the Global South?



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Abstract

This thesis explores some of the recent changes in the Cuban educational system in the post-Fidel period, in particular those related to the teacher profession. Among the countries of Latin America, Cuba shows the best performance in education as per UNESCO (2009). In the 1990s, Cuba entered a period of change and transition followed by the collapse of the USSR, its closest international partner. This transition has largely been driven by globalization through tourism, neoliberal policies, double currency, technology, etc. It has been argued in the literature that these changes have made the teachers and the educational system vulnerable. I take these claims as a starting point and further explore how the changes in the Cuban society have affected teachers and the Cuban educational system as a whole in the post-Fidel period.

Through the global architecture of education theoretical framework, I explore the current features of the Cuban educational system. Further, through the concept of transition I discuss the implications of the most recent changes in the status of the teacher profession. I argue, among other things, that throughout the post-Fidel transition there has been a higher exposure to Western values, for instance, as a result of internetization. Western values seem to come in conflict with the Cuban anti-imperialistic and anti-capitalistic ideologies traditionally embedded in the educational system. The discrepancy already existing between what is taught at school by teachers and what is out there in the reality increases. This puts teachers whose task is to drive this ideological education in a challenging position. Nevertheless, it seems that the Cuban educational system keeps being rather deviant from the features embedded in the global architecture of education; starting from its state-generated social capital, which does not reproduce the status quo and relieves the school system from its classist nature. At the same time, new and old factors such as spreading of internet and tourism are having more impact in the island and Cuba is challenged to reach a compromise with these factors in order to not sacrifice its educational principles and successes. One of my key findings is that it appears that teachers' economic condition largely affect their position since their condition often leads them to turn into the illegal or gray area.

The data was gathered during my fieldwork, through a qualitative-focused ethnographic research, where I conducted informal interviews with teachers and “knowledgeable people” about the teacher profession.

Resumen

Esta tesis explora algunos de los cambios en el sistema educacional cubano en el periodo post-Fidel, en particular aquellos cambios relacionados con la profesión docente. Entre los países de América Latina, Cuba muestra el mejor rendimiento en cuanto a educación de acuerdo con la UNESCO (2009). En la década de los noventa, Cuba inició un periodo de cambios y transición seguido por el colapso de la Unión Soviética, su más cercano compañero internacional. Esta transición ha sido impulsada en gran medida por la globalización a través del turismo, las políticas neoliberales, la doble moneda, tecnología, etc. Se ha discutido en la literatura que estos cambios han hecho a los maestros y el sistema educativo vulnerables. Tomo estas reivindicaciones como un punto de partida para explorar más a fondo cómo los cambios en la sociedad cubana han afectado a los maestros y al sistema educacional cubano en su conjunto en el periodo post-Fidel.

A través de la arquitectura global de la educación en el marco teórico, se exploran las características actuales del sistema educativo cubano. Además se discute que durante el periodo de transición post-Fidel, ha habido una alta exposición de valores occidentales, por ejemplo, el resultado de la internetización. Los valores occidentales parecen entrar en conflicto con las ideologías antiimperialistas y anticapitalistas cubanas tradicionalmente integradas en el sistema educativo. Esta discrepancia que existe entre lo que se enseña en la escuela por los profesores y lo que hay afuera en realidad, ha incrementado. Esto pone a los maestros, cuyo funcionamiento es de aplicar esta educación ideológica, en una posición difícil. Sin embargo, parece que el sistema educacional cubano se mantiene en lugar de ser desviado de las funciones integradas en la arquitectura global de la educación; partiendo de su estado capital social, el cual no reproduce el status quo y alivia el sistema escolar de su naturaleza clasicista. Al mismo tiempo, nuevos y viejos factores como la difusión de Internet y el turismo están teniendo un mayor impacto en la isla y Cuba es desafiado a alcanzar un compromiso con estos factores para no sacrificar sus principios educativos y sus éxitos. Una de mis principales conclusiones es que la situación económica de los profesores afecta en gran medida su posición, ya que su condición a menudo los conduce a pisar la zona ilegal o gris.

Los datos fueron reunidos durante el trabajo de campo, a través de una investigación etnográfica cualitativa, dónde se llevaron a cabo entrevistas informales con los profesores y “gente experta” sobre la profesión docente.

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I would like to thank my gatekeepers, without their support these would be blank pages. In different ways, they were able to open the doors of their country for me. Through their help I was able to explore different shades of Cuba. The experience of field work and the consequent work on the thesis was a giving experience for me. While we look for the truth, we realize that there is none, since a variety of relations and variables explain and explore several truths.

I would like to give special thanks to my friend Gala, for helping me after fieldwork when I was confused with my data and all the time I was generally confused. Thanks to my dear friend Lorena that helped me with the Spanish translations, her contribution was fundamental. The girls that spent a year sitting with me in the master room: Jen, Sarah and Eirin; sipping bad coffee and sharing both the frustration and excitement of the writing process.

To my amore, which I hope will still marry me despite these last crazy months, I owe him everything. Thanks because you supported and looked after me until the end, with your unconditional love and your Norwegian cooking.

I dedicate this master thesis to the Italian PhD Giulio Regeni who died this year while conducting his fieldwork in Egypt. His research was about labor unrest and independent trade unions.

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1.0 Introduction

In December of 2014, the Cuban and US government officially started a normalization of their diplomatic relationship. This process marked the beginning of the end of an era spanning more than 55 years, since the revolution of 1959. The relationship between the two countries in this period has been characterized by armed conflicts, cold war, trade embargo and other economic and political tensions. The diplomatic normalization represents one of the most recent and important changes that are occurring in the country. The normalization between the two countries received extraordinary coverage by the international media, but it also received the attention of the critical voices that used to consider Cuba the last anticapitalistic paradise.



Figure 1 Cuba and Florida's proximity (Perry-Castañeda, 2015)

Cuba, however, according to many scholars, like Breidlid (2013), Carnoy et al. (2007), Griffiths (2009), is much more than just an anticapitalistic paradise; after the revolution Cuba developed into a country offering free schools and free health care; it is a safe country to visit with high literacy rate and strong commitment to income equality (Carnoy et al., 2007). Despite being a country situated in the global South with an underdeveloped economy, Cuba's educational system has been compared by UNESCO (2005) to countries like Finland and Canada for its educational quality.

However, in the 90s, the collapse of the Soviet Union brought Cuba into economic instability. The Cuban government then declared a "Special Period in Time of Peace" to face the national emergency (Chomsky, Carr, & Smorkaloff, 2003). Changes have been introduced in the island like access to dollars, tourism, foreign investments, etc. These changes signal the potential move towards a capitalistic economy. It appears that Cuba has transitioned from

trading only with the Soviet Union¹ to opening up to the global economy. This transition, characterized by capitalistic economic measures has several consequences for the Cuban society; further, it may also impact on the educational system. For instance, inequality represents one serious implication brought by the period of transition. The inequality is characterized by differences in the access to dollars. Access to dollars is limited, for instance to those who works with tourism. Hence, it affects all the professions outside the dollar system, like the teacher profession.

Despite the ongoing transition UNESCO (2009) still reports Cuba's performance as the highest in Latin America. Further implications on the educational system ought to be explored since part of the literature, as Carnoy et al. (2007) and UNESCO (2009) do not consider the effects of transition on the educational system. In particular, maintaining the traditionally high esteem of the teacher profession, typical of the Cuban society, seems to be the new challenge for the government.

In the next chapter, I will present the rationale for my thesis and the research questions that are guiding the study.

1.1 Problem statement

The *transitional period* that started in Cuba after the collapse of the Soviet Union has led to the adoption of different measures and strategies that are possible to be traced to the process of globalization. Although maintaining its socialist system, the anti-capitalistic, and anti-imperialistic ideologies, Cuba, has not been able to avoid entering the global economy, at least to some extent. New measures for the Cuban economic system meant several changes in the society as a whole.

My research focuses on the latest period of the *transition*, when President Raul Castro, took over the government in 2008 after his brother, Fidel Castro, fell ill. For this reason, I will call this period (from 2008 and on) the *post-Fidel period*. Policies and reforms of the latest transitional period have generally followed a neoliberal approach. An example of this is the increase of market-oriented reforms, e.g. selling and buying property and opening small businesses became legal. This is still far from the capitalism happening 90 miles away from the island, in the US, but the post-Fidel reforms represent a change from the past. Even if there has not been major reforms affecting the philosophy behind the educational system,

¹ Cuba was part of the CMEA, hence trading with the Soviet Union and other socialist states

other reforms and changes of the Cuban society, driven by the process of globalization, in general, seem to have affected the educational system (Breidlid, 2013).

As noted above, Cuba has achieved universal access to schooling; this, according to several authors, is in line with the socialist logic of education (Breidlid, 2013; Carnoy et al., 2007; Griffiths, 2009). Moreover, the achievement of universal schooling is in line with the United Nations Millennium Development Goals², represented by the *Education for All (EFA)* (UNESCO, 2000) movement. Hence, Cuba as a socialist state from the global South, may share some of the goals represented in the rhetoric of the EFA movement. The EFA movement represents one of the many themes on education, which have been brought up by international organization and NGOs in the 1990s, to extend their influence on the global educational agenda (Jones, 2007). The global agenda in education is represented by international organizations and NGOs strategies for the future of education (EFA movement, for example), its supervision and implementation. Taking these considerations and tensions as a departure point, I consider it interesting to more closely discuss whether the Cuban educational system is also affected by the global educational agenda.

In addition, by acknowledging that the processes of globalization occurring in the Cuban society are affecting education I consider it interesting to closely discuss the effects of these processes in the Cuban educational system. In order to explore these relations and these effects, I will use the theory of *the global architecture of education*. Through this theory, I will be able to examine the features of the Cuban educational system, e.g. the epistemological and ideological, in relation to the features of the global educational agenda. In addition, in the study I will try to identify the nature of the changes and the reasons for the changes in the Cuban educational system. Finally, the discussion will attempt to find out how the changes occurring in the Cuban education are related to the transitional period.

The literature of transition in the global south in countries such as Cuba, Vietnam and Cambodia tends to consider those countries as irrelevant cases to explain the effects of transition. The experiences of the socialist South, like Cuba, appears to be marginal in research while according to Reid-Henry (2007), they are a valuable as

² MDGs, the eight development goals established by United Nations, range from fighting poverty to providing universal primary education

[Cuba, Vietnam and Cambodia] these countries³ have undergone significant transitions as they re-think their political-economic systems in light of the pressures of an increasingly post-socialist world. (...) These countries offer an important transition experience, therefore, and yet they have been largely overlooked (Reid-Henry, 2007, p. 445).

My project, while being premised mostly on the inspiring work of Breidlid (2013) and Carnoy et al. (2007) who conducted empirical studies in Cuba, takes the process of transition as one of the main conceptual frameworks.

As explained in the introduction, the teacher profession is affected by the transitional period because of the unequal access to the dollar currency which creates economic inequality. In fact, many scholars have already addressed the issue of teachers choosing a career in the tourist industry (Breidlid, 2013; Carnoy et al., 2007). In addition, recent changes, due to the same globalization impulses may devalue the high status that is usually attributed to the teacher profession. Status is here understood as the way society looks respects and values teacher's professional role. Teachers are exposed to the effects of transition because they are in a constant process of interacting with the youth. From a sociological perspective, children do not just adopt structures of change in culture and society but they are also actively contributing to them (Corsaro, 2005).

Notably, children and the new generation of youth in Cuba did not experience the historical period of the revolution. Neither did they experience the period of better economic conditions during the Soviet Union trade. Hence, they may be more open to political, economic and cultural transition. An example can be through technology as digital generations are much faster in picking up on the new ways of communication. It may appear that the post-Fidel transition brought new economic changes that have several implications for the educational system. Particularly for the teachers, since younger generations may more likely be open to challenge the socialist, anti-capitalistic and anti-imperialistic ideologies that are part of the knowledge production of the Cuban teachers.

1.2 Objectives

Since the 90s macroeconomic changes have led to a transitional period in Cuba. This study focuses on the last transitional period, the post-Fidel period, and aims to explore the implications of the changes in the Cuban educational system and the status of the teacher

³ In which the political ideology remains socialist

profession. Hence, the research aims to investigate the multiple dimensions of transition and to understand its complex political and economic threads which can be traced to the process of globalization. Through a critical review of the Cuban educational system in relation to the global architecture of education's main features, I will try to add a different perspective of analysis to the field of Comparative education.

1.2.1 Research questions

In particular, through data gathered during fieldwork, the study attempts to explore the following questions:

- To what extent do the features of the Cuban educational system differ from the features of the global architecture of education?
- What are the effects or implications of post-Fidel transition on the Cuban educational system?
- To what extent has the status of the teachers been impacted by the transitional period of post-Fidel?

It is important to clarify that there have been several transitions in Cuba, where one major transition may lead to other smaller transitions. In my thesis, I understand the latest major Cuban transition as the one that started in the 90s and that brought the island from being supported by the Soviet Union to be self-reliant. This independency brought the government to face the economic crisis with three development strategies: food programme, the tourism programme and the biotechnology programme (Fidel Castro cited in Babb, 2011). In my study, I understand the post-Fidel transition as the last one, nevertheless still connected with the one started in the 90s due to the similar market-oriented strategies.

1.3 Outline of the thesis

The thesis is divided into six chapters. In the first chapter, I presented the premises of the thesis based on the current educational, political and socio-economic situation in Cuba. First, I argue that the decision of entering a capitalist global economy has affected the Cuban educational system. This claim is based on the work of Breidlid (2013) in which he deals with a more contemporary reality of the Cuban educational system. The author acknowledges that education no longer has the high standards that it used to have during the period of Soviet Union support.

Second, I argue that teachers, in particular, represent a vulnerable profession considering the new developments of the Cuban society. The overall discussion rests on the consideration that the Cuban context is characterized by a period of transition which derives from a globalizing process that started in the 90's.

In the second chapter, I set the background by giving an account of the historical achievements in education after the revolution and how this has shaped the main characteristics of the Cuban educational system. Further, I present the economic context of Cuba, what has changed significantly since the collapse of the Soviet Union and the consequences of these changes. Finally, I present the contemporary improved relationship with the US, symbolized by Obama's visit. This is needed in order to have an overall understanding of the complex threads that connect Cuban education with its politics and its economic profile.

The third chapter presents the theoretical framework and concepts needed for the discussion, and locates the study within the theoretical setting. Jones' (2007) and Breidlid's (2013) theory of the global architecture of education (GAE) will be presented in the first part of the chapter. The second part presents the experiences of transition in the contexts of Latin America and former socialist countries. From these experiences I will generate an abstract understanding of transition that will enable further the discussion of my findings.

In the fourth chapter I elaborate on the methodology and methods used in my study. In addition, the methodology chapter will present the research design, the methods used for data collection, a critical overview of the role of the researcher, the ethics, and limitations.

In chapter 5, I will discuss my findings in two separate sections. In the first section I will use the literature to identify the key features of the Cuban educational system which will be discussed through the lenses of the global architecture of education. In this section, the first and second research question of the study will be discussed. The second section is more data driven. Through the concept of transition I will more closely explore the third research question about the teacher profession.

Finally, in chapter 6, through the conclusions I will try to provide coherence in the overall study. Chapter 6 reviews the arguments included in the discussion of the thesis and reflect on potential developments for the thesis.

2.0 Background

The purpose of this chapter is to set the stage for the thesis. I will do so by going through the history of educational change in Cuba. In order to put this study in perspective it will be crucial to first give an account of the educational structures and services preceding the revolution. Further, I will present the main educational developments and achievements of the revolution since the most influential event affecting Cuba's educational system was the Cuban revolution in 1959 (Mesa-Lago & University of Pittsburgh, 1971). However, as a small country, depending on imports from trade partners, Cuba has always been affected by the economic relationships with other countries (Ritter, 2006). These relationships have also left a mark on the models of education which Cuba has adopted throughout time. That is why it is important to set the study in the historic and economic context as well. Finally, I discuss the contemporary political circumstances and the latest developments on the island which will complete the picture.



**Figure 2 one of the many road signs in memory of the revolution “Revolución voluntad de un pueblo”-
Revolution will of the people**

2.1 The struggle for education: pre-revolution

Massón Cruz (2015), when referring to Spanish colonization (from the end of the 16th century until 1902), describes private schools and religious schools⁴ in Cuba as revolutionary. This is because during the Spanish colonization there was no public schools; religious institutions were the only groups committed, through both elitist and poor schools, to increase literacy in the Cuban population (Massón Cruz, 2015). The Spanish colonial power had little interest in introducing a public-schooling system.

Education continued to follow the colonial pattern in which relatively small elite of plantation owners, bureaucrats, and professionals educated their children in private schools or abroad (Mesa-Lago & University of Pittsburgh, 1971, p. 377).

Under the neocolonial time, 1902-1959, which culminated with the revolution, the Cuban educational system was administered by the US. Hence, the first reforms and developments on the matter of public education were under the sponsorship of the US as, stated above, Spanish colonization never got engaged with education (Massón Cruz, 2015). However, in this period, Cuba moved to an era of imposed modernization and Americanization (Mesa-Lago & University of Pittsburgh, 1971). The imposition was reflected in the educational system as well. In this regard, Iglesias Utset (2003) used the training of Cuban teachers in Harvard University from 1910-1930 as an example of American humanism but also as a plan of cultural imperialism. Throughout this neo-colonial period, Cuba was exposed to new philosophies in education, e.g. kindergartens and practices connected with the middle-class values founded in the American public-school model (Mesa-Lago & University of Pittsburgh, 1971).

Breidlid (2013) points out the persistent levels of corruption in the educational system in the period before the revolution, which left the unprivileged and marginalized parts of society behind. On the other hand, Massón Cruz (2015) explains how Cuba was witnessing high economic development in the 1920s and 1930s. But the gains from the economic growth were distributed unevenly, depending on economic interests. In the context of high corruption, inequality and US intervention, it is possible to understand the anti-imperialistic character of the Cuban revolution; which is reflected in the character of the educational system after the revolution.

⁴ The majority run by the Dominicans

2.2 Education after the revolution: the Cuban education platform

Immediately after the revolution, in the 60s, the Cuban government launched a literacy campaign for the whole Cuban population. The educational goal of the campaign was to eradicate illiteracy from the island. However, the new government had the objective to use education also to overcome the US neo-colonial struggle (Breidlid, 2013). According to the revolutionary direction, education lacked of relevance “to manpower needs for economic development and, especially, to its continuing U.S, influence and linkages, which gave the system a neocolonial cast” (Mesa-Lago & University of Pittsburgh, 1971, p. 385).

After the revolution, the state became the only responsible entity for education. During my fieldwork, I had the chance to talk to those who participated in the alphabetization process back in 1961. Back then, they were very young, 16 years old. An informant told me that since her parents were from the middle class, they did not allow her to take part in the process of alphabetization. She did not give up on the project and falsified the signature for the parental permission. Another informant told me that he was sent to alphabetize in a mountain area. Later he was moved because a volunteer like him had been killed by the guerrilla⁵. They remembered the period as a period of hope and great enthusiasm for the revolution. From 1960 to 1969 the new government initiated the Cuban education platform, characterized by:

- Free and universal education for everyone;
- State absolute responsibility for education (in 1961 private schools were removed);
- Co-education: all in the same room (no division between classes);
- Secular;
- Scientific orientation;
- Linking theory with practice;
- Education through manual work being important factor;
- Education on values (integral education): essentially based on the understanding of the history of Cuba, which involves patriotism, anti-imperialism. These ideologies are mainly based on the ideas of Martí⁶ and Fidel Castro⁷ (Massón Cruz, 2015).

⁵ Even after the revolution there were still armed conflicts

⁶ Estudio trabajo (studying and working), working in the nature, ideological value of the school by the literature of Martí

⁷ He gave a mark on the philosophy of Cuban education until 2004-5

As an important economic partner, the Soviet Union most certainly influenced the nature of education. The most evident changes in the Cuban education were the embrace of the communist ideology and the idea of prioritizing scientific, technological and medical subjects (Massón Cruz, 2015). Plus, according to Massón Cruz, subjects like Marxism and Leninism were understood from the Soviet perspective. After all, the advances of the revolution were several; above all, it increased the number of schools in the rural area and the expenditure for education. These strategies in education are in line with the founding principles of Cuban revolution, i.e. to overcome the division of social classes (Mesa-Lago & University of Pittsburgh, 1971).

In more recent years of economic crises, as many of my informants pointed out, schools were never closed and education continues to be a priority, despite the transition to a more capital based economy. On the other hand, it is acknowledged by UNESCO (2005), Carnoy et al. (2007) and Breidlid (2013) that since tourism was reintroduced on the island, it may have affected the Cuban educational system. Arguably the industry of tourism has acted as a vacuum, attracting Cubans with high skills (Klak, 2004), such as qualified teachers.

2.3 The economic context of Cuba

At the beginning of the twentieth century, Cuba was freed from the Spanish colonial power, but was still a vulnerable country due to the constant political and military interventions from the US (Chomsky et al., 2003). The US was able to create a political and economic deal with Cuba, which made them the most important trade partner, mostly in the business of sugar. High corruption and unequal division of basic social benefits such as education and health care are some of the reasons that led to the Cuban revolution (Breidlid, 2013). From 1959, the island became a country with a social economic system and from 1959 until the 1990s Cuba's economic partner was mainly the Soviet Union. In the 1960s, fundamental economic actions ignited the political tension with the US: nationalization of private companies⁸, abolition of private enterprise, etc.

⁸ Owned both by US and Cuban citizens

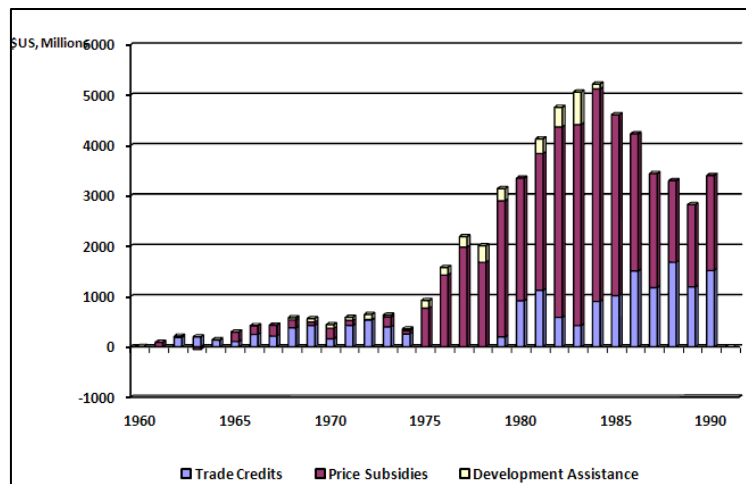


Figure 3 Economic Assistance from Soviet Union to Cuba 1960-1990 (Ritter, 2010)

From 1970 to 1986 the Cuban economy was significantly stimulated by Soviet trade support, as is shown in Figure 3.

2.3.1 “Special period”, tourism and double currency

With the collapse of the Soviet Union and consequent loss of all its assistance, e.g. imports of oil, Cuba declared a “Special Period in Peacetime” characterized by harsh economic conditions (Breidlid, 2013). According to Chomsky (2003), the Cuban government introduced a series of austerity measures that could be compared and associated with the structural adjustment programs used by the IMF in other countries of the global south. *Tourism*, as a development plan, was re-introduced on the island in 1991 to face this economic situation (Babb, 2011). Further changes were also introduced to the economy: access to US dollars and a free market for tourism and food selling⁹. The dollar that used to be the currency of tourism, later in 2004 changed to CUC (*convertible peso*), which became the second official Cuban currency after the peso. A CUC can be converted to 24 pesos.

As explained in the introduction, the “special period” created an economic gap in the Cuban society between those who work in the tourism industry and have access to CUC (or previously dollars) e.g. through tips (Breidlid, 2013) and those who have public employment. It is often argued that the latter group does not have access to foreigners. Thus, the restrictive two currency policy keeps hindering economic development and enduring inequality (Morris, 2014). A famous saying is used in Cuba to describe how Cubans react to the economic struggles of the “special period”: “Resolver, luchar, conseguir y inventar”- “resolve, fight,

⁹ Agromercados , fruit and vegetables market

obtain and invent”. This saying emphasizes the ability of Cubans to survive the very low salaries¹⁰. On the other hand, according to Padrón Hernández (2014), it lacks to analyze how the saying has been used to justify immoral behavior like stealing, corruption and creation of illegal markets.¹¹This argument will be later brought up by my findings as well.

The economic context of the special period was especially hard for traditional profession as the teachers. According to Hoffmann (2001), despite a drastic reduction in goods supplied to Cuba, the government held prices and salaries constant. This led to a high growth of money in circulation while consumer sales fell by 30%. As a consequence, the Cuban currency fell dramatically in value, making the imported goods more expensive (Hoffmann, 2001). Hence, the purchasing power of traditional professions decreased, while the people with access to foreign currency, e.g. through tourism, increased their purchasing power.

Low salaries were and are still not compensated by a low cost of living, e.g. dairy and basic products like milk are unaffordable: 500ml of milk cost 2.07 CUC and 500g of powder milk costs 4.46 CUC. The reasons for these high prices have an origin in the U.S’ 56 year old embargo and in the Cuban dependence of imports. The alternative to buying food in the stores in Cuba exists and it is called “the rationing system”, also called “libreta”. It is an arrangement designed by the government back in 1962 to distribute food. Through this system it is established in which “botega” you should shop, the quantity of food for each person that is allowed (to buy through that system), and the frequency of supplies. Even if the Cuban social welfare through the rationing system may try to support the families it is not enough and does not cover milk for kids after seven years old.

¹⁰ See decline of real wages level since 1989-1993 pag

¹¹ See chapter 5

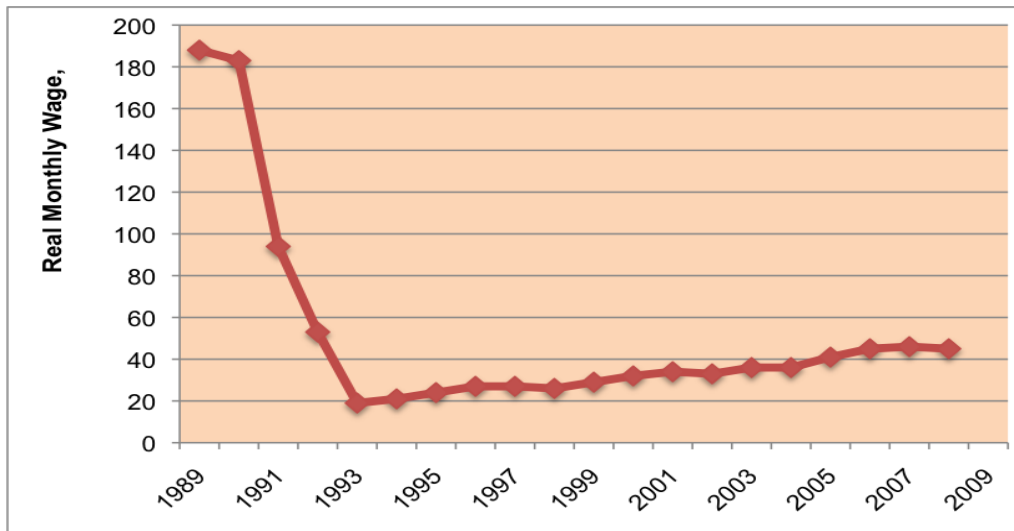


Figure 4 Real Monthly Wage, (Pavel Vidal, 2009)

Figure 4 shows how real monthly wages have suffered from devaluation. According to Lancaster and Sanyal (2013) the reforms implemented in the 90s to face the economic instability led to several inequalities, for instance in the salaries.

The Cuban economic development improved during the period 2004 to 2008 thanks to a new political and economic partner: Chavez and the Venezuelan revolution. In fact, according to Ritter (2006), Venezuela as the Soviet Union did subsidize Cuba through low-cost oil export, investment credits, and generous foreign exchange payments for Cuban exports of medical services. For Carnoy (2014), the newest forms of foreign exchange is represented by Cuba’s human capital of medical and teaching services. The new drive for Cuba, according to the author, is to turn into a knowledge-based economy instead of a tourism-based economy, which equates to investing heavily in higher education (Carnoy, 2014). However, replacing tourism with knowledge-based services is far from being an easy way out of the capitalistic world for Cuba. Especially now, considering the global oil crisis and Venezuela moving away from the Bolivarian revolution of Chavez. Moreover, due to the thaw in relations between the US and Cuba, American tourism has increased in 2015 by 36% (The Guardian, 2015).

2.4 Contemporary Cuba: Raul and Obama’s “period of peace”

Since Raul Castro took office he has increased the legal number of small businesses (2010) which were allowed since 1990, but in limited numbers. He introduced a new migration law, making it easier to travel outside the country. Through the implementation of market-oriented reforms, Raul, compared to his brother, may have advanced much further in updating the Cuban social economic model (Sweig & Bustamante, 2013). In addition, in July 2015, the

new president officially restored the relations between Cuba and the U.S through the re-opening of both countries embassies. However, the consequences of these developments may contribute to higher inequality, especially race inequality; for example through the expansion of remittances¹². According to the economic experts quoted in an article in the New York Times, “whites are 2.5 times more likely than blacks to receive remittances” (Archibold, 2015). Another shade might be that going capitalistic is not always as successful as hoped; one example is the poor results of the acclaimed agricultural reform (Lamar, 2015). Last but not least, the restrictive two currency policy keeps hindering economic development and endures inequality (Morris, 2014). Even though change might be felt by relatively few Cubans, there is an actual re-orientation of the socio-economic, epistemological, cultural and technological direction.

On the 22nd of March 2016, the President of the United States was on a historical visit to Cuba. 88 years had passed since the last visit of a US president to Cuba. In his speech, president Obama addressed the will to leave behind the ideological conflicts that the two countries had faced in the past: “I have come here to bury the last remnant of the Cold War in the Americas” (Obama, 2016). He advocated for a positive vision of the future in Cuba, especially for young generations. This positive view is based on the human capacities of innovation of the Cuban population:

In a global economy, powered by ideas and information, a country’s greatest asset is its people. (...) Here in Havana, we see that same talent in cuentapropistas¹³, cooperatives and old cars that still run. And in recent years, the Cuban government has begun to open up to the world, and to open up more space for that talent to thrive. In just a few years, we've seen how cuentapropistas can succeed while sustaining a distinctly Cuban spirit. Being self-employed is not about becoming more like America, it’s about being yourself (Obama, 2016).

Further in his speech, the President, through the examples of successful Cubans in business, claims the importance of supporting traveling to Cuba, the commerce, and even the internet. However, Obama discourages the double currency which differentiates the values of Cuban salaries. The visit of President Obama symbolizes what has happened in Cuba since the 90s,

¹² Amount of money that Americans can send to Cuba: to \$8,000 a year from \$2,000, as part of President Obama’s historic thaw with Cuba.

¹³ Self-employed workers

an opening up which generated an ongoing period of transition. Moreover, the speech emphasizes the importance of economic strategies in order to achieve economic growth, such as *market, tourism, one currency policy* and *new technologies*.

These strategies suggested and acclaimed by president Obama on a political and economic level, are clearly based on the neoliberal ideology and capitalistic vision. In this sense, the new approach of the US for reestablishing diplomatic relations with Cuba appears to be grounded on the same economic logic of the neo-imperialism of the beginning of the 20th century. Although there is no longer an attitude of forceful imposition, it appears that the claims of US rhetoric carry the same belief of the superiority of the Western ideologies.

In the next chapter, I will present the theoretical framework and related theories used in my study. Through these theories, I will better clarify the meanings of Western epistemology. Moreover, I will explain how Western epistemology is a founding concept that is supported by key theories that deal with the effects of globalization in the field of education.

3.0 Theoretical and conceptual framework

The research of this study followed an inductive approach, thus, the theoretical framework was selected after the categorization of the findings. The discussion in chapter 5 will show that various forms of socio-economic, ideological, and technological changes are occurring in the Cuban society. These changes are happening largely as a consequence of the globalization process. Therefore, I decided to adopt *globalization* as an overarching framework.

In order to examine the effects of globalization in the Cuban educational system, I will use the global architecture of education (GAE) theoretical framework. Changes in education are ongoing worldwide and the majority of them are supported by *the global architecture of education*. It is possible to find several concepts that are associated to this theoretical framework and constitute the features of the theory. These concepts, such as Western epistemology, neoliberal ideology, cultural capital etc. will later guide the first section of the discussion. In the discussion I will verify if these concepts can be found in the Cuban educational system as well.

To further understand the changes in the Cuban context, I will use a conceptual framework for the process of transition. In turn, the transitional process in Cuba is understood and constructed on the experiences of transition that occurred in Latin America and the post-socialist countries. It is possible to relate them due to Cuba's double identity; in fact, Cuba is partly Latin American and partly belonging to the former socialist camp. Understanding the complexity of the process of transition on an abstract level will help me to later discuss the findings that can be associated with the socio-economic transition, ideological transition and technological transition. And consequently explore how these different aspects of transition may impact the Cuban educational system and the status of the teacher profession.

Finally, the two theories will be more closely and critically analyzed. Since it appears that they are both characterized by neoliberal tendencies, it will be argued why together they might later help to give a better insight into the contemporary Cuban educational perception.

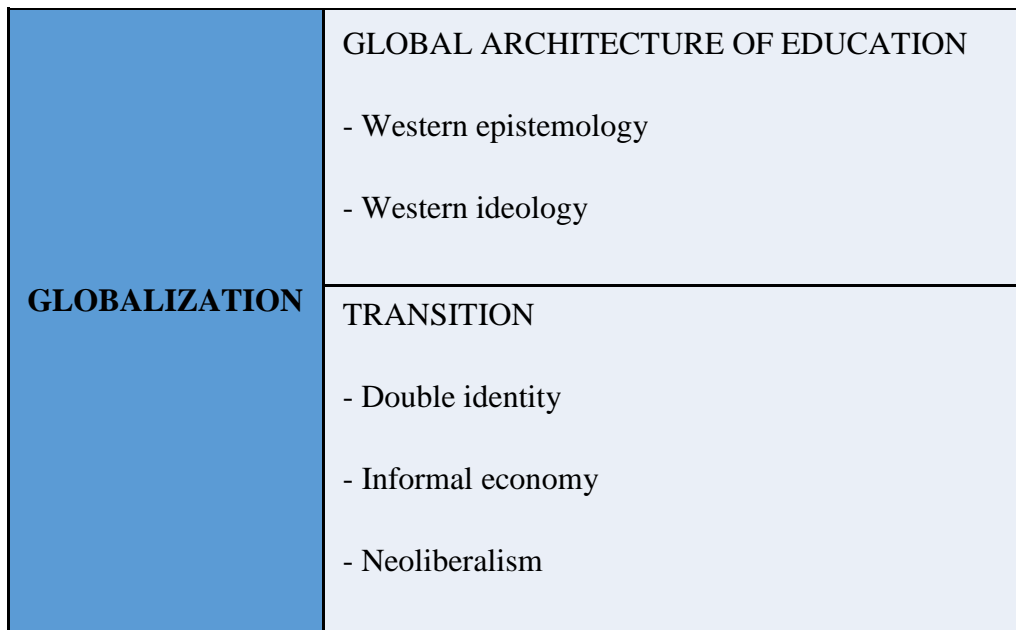


Figure 1 Summary of theoretical and conceptual framework

In figure 1, I represent graphically the theoretical framework and the main concepts which derive from it; transformations in Cuba may be part of the comprehensive nature of globalization, thus, I need to look more closely at the theories and concepts that are directly implicated within the Cuban social, economic and educational context: the *global architecture of education* and *transition*. From these, other important concepts such as Western epistemology, ideology and informal economy are explored.

3.1 The effects of globalization on education

With globalization as a starting point, I will progressively discuss which theories can best explain the implications of globalization in education.

Globalization has been defined in a variety of contexts and fields. However, it can generally be defined as a process of growing interdependence between individuals, localities, international economic systems and cultural factors (Verger, Novelli, & Altinyelken, 2012). The term however, has become so broad that it includes multiple concepts and interpretations. It can be viewed, by some scholars, as the rise of neoliberalism and a hegemonic policy discourse or, by others, as a production of new global cultural forms, e.g. media and ICT (Burbules & Torres, 1999). Nevertheless, these different interpretations have one common denominator that characterizes the process of globalization: homogenization. The process of globalization will be narrowed down in order to focus on the dimensions that best explain potential changes in the educational system of post-Fidel Cuba.

3.1.1 The theories that focus on the effects of globalization on education

My study focuses on the effects of globalization on Cuba's educational system, hence, I will examine only the theories of globalization that are relevant for my research. There are two main theoretical approaches that explore the implications of globalization in education: the World Society theory (Verger et al., 2012) and the global architecture of education theory (Breidlid, 2013). World Society theorists like John Meyer, John Boli, George M. Thomas, and Francisco Ramirez (1997), argue that

worldwide models define and legitimate agendas for local action, shaping the structures and policies of nation-states and other national and local actors in virtually all of the domains of rationalized social life—business, politics, education, medicine, science, even the family and religion (Meyer et al., 1997, p. 145).

When focusing on the cultural dimension of the World Society, they claim that the spread of a single model of schooling is part of the global diffusion of a more general model of the modern state (Breidlid, 2013; Verger et al., 2012). Through their perspective, they claim that the world is one culturally. According to Meyer et al. (1997), through the World Society theory it is possible to explain the process of homogenization that occurs to the human values worldwide; for instance to human values such as human rights, status of women, status of children etc. These values and themes ascribed to some countries are then expanded and standardized around the world. The World Society theory, to some extent, may appear similar to the global architecture of education theory (Breidlid, 2013). Both theories see the educational systems worldwide looking more and more alike, since modern states implement similar policies and have similar agendas. In fact, Meyer et al. (1997, p. 145) “account for a world whose societies, organized as nation-states, are structurally similar in many unexpected dimensions and change in unexpectedly similar ways”. At the same time, Jones (2007, p. 334), when describing the homogenizing process of the global architecture of education, claims that “education is less and less a free-standing, readily identifiable programme category, and is now more frequently blended in with generic economic and social policies”.

However the two theories diverge when talking about the outcomes of these homogenizing processes. For Meyer et al. (1997) the world society, due to its universalized culture and rationalized modernity has succeeded to address “the growing list of perceived social problems” (Meyer et al., 1997, p. 175) of crimes such as torture, violence, waste dumping etc. Meanwhile authors such as Breidlid (2013) understand globalization's effect on education as the spread of Western epistemology through a homogenizing and hegemonic process, which started during the modernity. Here, epistemology is understood as “the way people view and

make sense of the world according to what they have learnt and what they believe” (Bateson quoted in Breidlid, 2013). Since modernity, which started in the 15th century with European colonialism, the West as the hegemonic power has imposed its “Western way of conceiving and perceiving the world” (Tucker, 1992, p. 1) on the Other. The others are the people that did not originally follow the Western epistemology and they were “characterized as uncivilized, irrational, superstitious” (Breidlid, 2013, p. 7) by the West. According to Breidlid (2013), the Western hegemonic epistemology that homogenizes human values is unable to address all the challenges facing the world. Many of the key challenges, like poverty, hunger, inequality, exploitation, facing the world today is, in fact, a result of Western epistemology; so, how can we expect that Western epistemology can resolve these challenges. This is in contrast to what Meyer et al. believes (1997).

Daun’s (2002) “World Model for Education”, to some extent, has the same characteristics as the global architecture of education. In figure 2 below I present the model of Daun (2002), who identifies several components of the “world model for education”. Although Daun’s (2002) model recognizes the current homogenizing discourse in education, it does not address the epistemology behind the discourse of education.

Figure 2 the world model for education (Daun, 2002, p. 19)

ITEMS	CHARACTERISTICS
View of education	Education is good for all. Consensus perspective. Education contributes to development, economic growth, democracy (..)
Educational system	Seven to nine years compulsory. At least three years of secondary education preferable.
Curriculum	A national core curriculum; other parts flexible and adapted to local conditions. Education for global competitiveness, education for equality, education for empowerment, democracy, human rights, and citizenship, sexual education.
Financing	Basic subsidies from the central state. Private financing of education.
Organization	National skeleton, national framework. Decentralized bodies for making of decisions within the framework. Local participation-community participation.
Regulation	Surveillance and retroactive assessment by the state; choice exerted by parents and pupils.

Goals	Effectiveness and efficiency, rational production of multi-skilled people but at the same time instilling morals.
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For my study, it is relevant to uncover the epistemology behind the educational system. In order to find out if Cuba's educational system is also based on Western epistemology and influenced by global processes in education, I will use the theory of the global architecture of education as my main theory for the first section of my discussion.

At this point, it is important to closely understand the relation between the ideology of the global educational movements and their epistemology. In the next section I will present the theory of the global architecture of education.

3.2 The global architecture of education (GAE)

The reorganization of the European and later worldwide educational systems through the economic growth perspective is a consequence of the Marshall aid plans (Spring, 1998). Education was expected to be the most effective measure to fight the contemporary social problems because education was assumed to generate economic growth. Since the beginning of the 1980s, there has been a growing understanding in the educational arena of the concepts of neoliberalism and global governance. Educational changes are taking place globally following the understanding of these concepts. Governments tend to follow particular educational policies regarding evaluation, private financing (of education), assessment, standards, as well as testing and competitiveness (Burbules & Torres, 1999). These policies are implemented indiscriminately from the Global North to the Global South as solutions to the educational challenges faced by these nations. It is sometime argued that these policies have brought a decline in enrollment rates and quality of education (Breidlid, 2013; Daun, 2002; Tikly, 2001).

Breidlid (2013) defines the above mentioned global educational processes in the North and South as the global architecture of education. Jones (2007) recognizes the global architecture of education

as a complex web of ideas, networks of influence, policy frameworks and practices, financial arrangements and organizational structures—a system of global power relations that exerts a heavy, even determining, influence on how education is constructed around the world. (Jones, 2007, p. 325)

According to Breidlid (2013), it represents a homogenizing educational discourse and akin to globalization, this process focuses on imposing universal values and Western epistemology in the educational system worldwide.

Another important aspect of this theory is that it points out how education systems worldwide are under the influence of international organizations. These organizations have an *educational agenda* based on financial, business and economic grounds. Through their private research and data, they encourage and advise states and academic agencies what educational policies may be more suitable and appropriate; one common example being market-based policies (Steiner-Khamsi, 2012). According to many researchers, the global architecture of education is driven by international organizations such as the World Bank, the International Monetary Fund, and UNESCO (Breidlid, 2013; Daun, 2002; Jones, 2007; Steiner-Khamsi, 2012).

Recently, the undisputed architect and the most influential agency for the global educational agenda appears to be the World Bank (Breidlid, 2013; Daun & Sapatoru, 2002; Steiner-Khamsi, 2012). Through the inherited “Washington Consensus”, the World Bank acquired a monopoly position on matters of aid (Klees, 2012; Steiner-Khamsi, 2012). In return, several scholars have criticized the World Bank’s agenda for imposing its Western knowledge and its economic ideology without being culturally sensitive (Breidlid, 2013; Klees, Samoff, Stromquist, & Bonal, 2012). Scholars like Kamat (2012), contribute to the critique by pointing out that the World Bank’s strategy has been readjusted due to the recent global economic crisis. According to the author, the World Bank is minimizing the importance of quality of formal education leaning towards a more narrow focus, e.g. skills to fit in the labor market. An example is the World Bank’s goal of education: to qualify workers in terms of skills and in terms of developing their capacity to face the risks of the current unpredictable economy (Kamat, 2012).

Therefore, it is fair to argue that the global architecture of education and its global agenda works within a *human capital approach* in which education is mainly seen as an investment to generate economic growth (Marginson, University of New South Wales, & Public Sector Research Centre, 1989). The human capital theory is a comprehensive approach that is used to examine a general and broad range of human matters “in light of a particular mindset and propose policies accordingly” (Tan, 2014, p. 411). In this approach, educational reforms

become part of economic reforms, as former prime minister Blair quoted in Spring (1998) during elections declared:

In today's world there is no more valuable asset than knowledge. The more you learn, the more you earn. It's as simple as that. Education is an economic imperative (Spring, 1998, p. 5).

Following the approach of the prime minister, education is likely to increase the productivity and earnings of people. Therefore, the human capital approach sees education as an investment. Further, this investment is as central for the individuals as for the development of a country (Tan, 2014).

In the next section, I will identify the features that characterize the global architecture of education that will allow me, later in the discussion chapter, to explore it in relation to the features of the Cuban educational system.

3.2.1 Features of the global architecture of education

In his study on the global architecture of education Breidlid (2013) outlines important features of the theory such as Western epistemology and ideology. Further, I will present some of the pedagogical concepts that are considered relevant for the discussion of the Cuban educational system, e.g. cultural and social capital. In addition, I will look at other pedagogical features that may play as well a fundamental role in the homogenization of the educational discourse, like medium of instruction and culture of performativity.

Western Epistemology

Breidlid (2013) argues that the hegemonic Western epistemology is one of the main intrinsic aspects of the global architecture of education. According to the author

the domination of Western epistemology has had a major impact on the epistemological foundation of the education system across the globe-in the South as well as in the North (Breidlid, 2013, p. 2).

The West's image of itself as superior was backed by the Western values of individualism, rationality and scientific knowledge production which originated between the 16th and 18th century. Through these values and scientific knowledge, the Western imperialism, with its imposition of Western epistemology, was legitimized (Breidlid, 2013).

Following Breidlid's (2013) understanding of the GAE as the educational branch of Western epistemology, it is possible to argue that educational systems worldwide are based on Western scientific knowledge; that is, positivism, rationality and objectivity. The Western

epistemology holds a hegemonic position in relation to other knowledges that exist in the different school contexts. The imposition of Western knowledge and the non-recognition of other epistemologies can create alienation, leading to “indigenous students suffer because the knowledges they bring from home are not been discussed or valued in the classroom” (Breidlid, 2013, p. 55) . The same alienation experience may occur with the curriculum through the irrelevancy of its content due to the adoption of the Western epistemology. If the school uses a curriculum which does not reflect the values, history and knowledge learned at home, it creates exclusion through lack of acknowledging other knowledges as legitimate (Breidlid, 2013).

Apple (1993) points out how certain knowledges claim their superiority over others; this entitlement is the consequence of “complex power relations and struggles among identifiable class, race, gender and religious groups” (Apple, 1993, p. 47). The objectives inside the educational policy and practice are the consequences of these struggles between dominant groups to make their knowledge legitimate and to increase their success through social mobility and influence (Apple, 1993). However, according to Apple (1993), the politics for legitimizing the knowledge by powerful groups are made by negotiations between groups where the circumstances favor the powerful groups. These negotiations happen at different stages: political and ideological discourse, educational policies like curriculum, or more directly class activities (Apple, 1993). In the next section, I focus on the ideological features that educational systems can implement and how these ideologies can be used by dominant groups as an advantage.

Western ideology

Since the revolution Cuba has attempted to pursue certain ideologies. These ideologies are reflected in the educational system as well. In the discussion I will explore whether Cuba’s educational system is affected by Western ideology, because within the global architecture of education it is possible to find the use of a specific Western ideology, for instance embedded in the curriculum.

According to Gramsci quoted in Weis (2006) “ideology represent the commonsense beliefs of a social group or class” and a “dogmatic system of eternal and absolute truths” (Weis, McCarthy, & Dimitriadis, 2006, pp. 96–97). In this sense, ideology as dogma represents a belief that cannot be questioned. In the West, it could be applied to discourses such as modern science and democracy (Weis et al., 2006). The ideology behind the global architecture of

education holds the interests and perspectives of the dominant groups of the West. These ideologies follow the neoliberal, capitalistic and consumeristic perspectives and they are embedded in the global architecture of education.

Ideology differs from epistemology because ideology has a heavier political emphasis. Imposing an ideology can be seen as a way to alter individuals' perception of their condition and position in the society (Breidlid, 2013). The direct or indirect imposition of Western hegemonic ideology through education, e.g. privatization, is used to benefit the powerful groups of society while deceiving the non-powerful groups. This is the case in Chile, where education has been privatized and therefore created inequality between classes (explained further below). Further, it appears that the belief of Western hegemonic ideologies within the global architecture of education does not leave space for counter hegemonic discourses. In chapter 5, I will further discuss how ideology is connected with the Cuban educational system.

Cultural Capital and Social Capital

Since educational systems are responsible for reproducing cultural capital, it is important to explore what kind of capital is reproduced in Cuba (Bourdieu & Passeron, 1990). In this section I will present concepts of cultural and social capital that will guide my discussion later on. Ivan Illich (1971) in "*Deschooling society*" argues that the system of schooling was created as a system of ideas to gain control over knowledge; it seems that the author was already aware of the powerful structures of knowledge. In this context, the theory of *cultural capital* by Bourdieu & Passeron (1990), is relevant for the approaches that study the distribution of power through knowledge. The cultural capital represents the legitimized knowledge which, if owned, confers status and social mobility (Bourdieu & Passeron, 1990). The benefitted group is the dominant group in society, as determined by the group's ideology, socio-economic class and epistemology.

However, the part of society that has a different cultural capital than the groups in power struggles to achieve the same power and social mobility and may hence be marginalized (Apple, 1993; Breidlid, 2013). Hence, following Apple's and Bourdieu & Passeron's perspective, the curriculum may benefit some children and disfavor others. For instance as Bernstein quoted in Breidlid (2013) states, the use of language may represent an important example of cultural capital. Children of working class parents may experience alienation in school, because the language of instruction is the English used by the middle class. Since the

working class kids do not speak English like the middle class, they do not have the right cultural capital.

Western epistemology, as supported by the hegemonic institutions and groups behind the global architecture of education, may be seen as the right cultural capital in the global architecture of education. If this cultural capital belongs to a social class in a country, students who do not belong to this social class may then perform poorer in schools. Hence, cultural capital is one of the building blocks of the global architecture of education.

Social capital as defined by Carnoy et al. (2007, p. 11), “is embedded in relationships among individuals or among institutions and benefits all individuals or institutions involved in those relationships by making their work more productive”. It is not sufficient to look only at cultural capital when analyzing educational systems; cultural capital is mainly focusing on how social class determines school performances. Social capital, on the other hand, emphasizes the importance of establishing relationships between all parties involved in knowledge production, independent of class. Examples of such relationships are relationships between parent and child and community and child (Carnoy et al., 2007). These relationships may increase the chance of academic success of students, and hence contrast the importance of social class apparent in the concept of cultural capital. In the discussion, key concepts of cultural and social capital will be important to understand whether the Cuban educational system differs from the global architecture of education.

State-generated social capital is not a common concept in the global architecture of education but it is used in educational systems that deviate from the global architecture of education. The concept of state-generated social capital will be discussed further in the discussion chapter. Above I have explored the features that make the global architecture of education the current hegemonic and dominant discourse in education; in addition I have explored the complex relations that exist between knowledge and power.

Medium of instruction

Language represents one of the pedagogical features that contribute to the homogenizing process of the GAE if the medium of instruction is not the mother tongue. Breidlid (2013) underlines the importance of learning by using the mother tongue; not just because it is proven to give better results but also to avoid an imbalance that is created if students do not have the necessary skills to face a foreign language, for example indigenous populations. Unfortunately in the global south, many international organizations lending money to

governments or NGOs do not consider mother tongue as a prerogative for the instruction (Breidlid, 2013). For this reason, the educational experience instead of being a positive one may create alienation towards the teaching content (Breidlid, 2013). However, in Cuba, Spanish is homogenously spoken as the official language. Although the use of the Spanish comes from the colonial period on the island there is hardly any trace of a pre-colonial culture, which may symbolize the total disintegration in the Caribbean island of the native population (Chomsky et al., 2003). At the same time, only recently has English¹⁴ become an essential requirement in order to graduate, following the same linguistic requirements as in Europe (Correa, 2015).

Culture of performativity

Performativity, is here understood as

a technology, a culture and a mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change - based on rewards and sanctions (both material and symbolic). The performances (of individual subjects or organizations) serve as measures of productivity or output, or displays of 'quality', or 'moments' of promotion or inspection. (Ball, 2003, p. 216)

The culture of performativity with its standardized tests and benchmarks may be part of the same homogenizing process of the global architecture of education. Since both UNESCO (2005; 2009) and Carnoy et al. (2007) use standardized tests to assess the academic advantage of Cuba, I find it relevant to look what the literature says about the culture of performativity. The culture of performativity has been initiated amongst others by OECD and UNESCO in order to push and influence educational policy (Ball, 2003; Burbules & Torres, 1999; Carnoy & Rhoten, 2002; Steiner-Khamsi, 2012). In addition, the culture of performativity tends to be a homogenizing process, both domestically and globally, which occurs when indicators of performance are framed (Ball, 2003; Carnoy & Rhoten, 2002). In fact, assessing the quality of educational systems is related to the vision of education as a financial investment (Carnoy, 2002); this has given importance to math and science curriculum for instance, or to standards and testing.

According to Carnoy and Rhoten (2002), testing and standards are part of a wider plan to increase accountability for the whole educational system. These tests are assessing knowledge production, i.e. how human capital is acquired and accumulated, and they can also be used to

¹⁴ Intermediate level

assess *teachers*. International tests are also pressuring teachers on meeting certain standards which affects the way education is delivered, e.g. tests are the ultimate goal of education. Thus, the culture of national and international testing is also part of the global architecture of education.

Further, publishing and disclosing test results can be used by national governments around the world for different political aims (Steiner-Khamsi, 2006). In fact, testing may be “part of the struggle over control of the educational system and credit from its improvement” (Carnoy, 2002, p. 315). However at the same time, testing can be used to push down the blame to teachers and local administrators (Carnoy, 2002). In Chile, on the other hand, publishing test results is considered as a measure of informing parents about the quality of schools in order to let them make the best choice; under the neoliberal assumption that competition will raise the quality of education (Carnoy et al., 2007).

It appears that educational systems are increasingly focusing on efficiency and productivity in order to compete at an international level (Ball, 2003). The winner is the one who owns the globally legitimized knowledge, in other words, the right cultural capital. However could it be possible that countries with a different approach to cultural capital can be successful in a globalizing world? Or is a homogenous global cultural capital a prerequisite for success?

Another way to understand the effects of globalization in education is through the examination of what it means to experience a process of transition. Previously I explained that Cuba since 1990s has gone through economic instability. Thanks to the tourism industry and the introduction of market-oriented reforms the economic instability has resulted in different processes of transition. I will look closely at the period of transition of the post-Fidel era in order to better discuss and present the findings in the discussion chapter.

3.3 Cuban double identity: both Global South and socialist country

The post-Fidel transitional period that I choose seems to have no precise theory that fits perfectly with the complex process occurring in the country. In fact, the conceptual framework of transition can assume different meanings and characteristics according to the different geographic contexts and historic periods. According to Hoffmann (2001), Cuba can be seen as a country of double identity; it is a Latin American country and thus part of the global south, but at the same time it is a socialist state who used to be part of a trade group

together with countries of the socialist camp¹⁵. This double nature could make the application of a single and general theory inaccurate and restrictive. The challenge of this section is to convey a way in which to understand the diverse forms of transition in Cuba and how they may affect the status of the teachers in the post-Fidel period.

Rather than being a straightforward process of changing from one hegemonic system to another, the transition process is composed by a complex revision of old social relations in order to construct a new socio-economic project (Pickles & Smith, 2005). For this reason, the study of recent developments in Cuba should be seen through the perspectives of both the Latin American transition and the transformation of the socialist states in the former Soviet Union (Hoffmann, 2001). In the following paragraphs, I will describe two approaches which explain transition in the contexts of Latin America and post-socialist countries. The reason for contextualizing the concept of transition is due to the Cuban double identity explained above; in addition, the theories will support my analysis later, i.e. to better understand the ongoing changes in the Cuban society and educational system.

3.3.1 Postcolonial world and global dominance: experiences of transition in Latin America

Transition in Latin America is relevant to my study not just because Cuba is part of the Global South. It is especially relevant because the Latin American experience of transition was influenced by a Western approach to economy and Western epistemology. Further, the implementation of neoliberal economic policies like SAPs¹⁶ affected their educational system as well (Carnoy, 2002).

In “*Globalization and the Postcolonial world*”, Hoogvelt (2001) illustrates how globalization has an impact in the Latin American countries . The author understands the process of transition in Latin American countries as democratization periods. However this democratization period was followed by the application of a neo-liberal model in the 80s, in which: “for the ruling class, all that matters is to create the most profitable conditions to attract mobile international capital: cheap labor, lax, and flexible working condition” (Hoogvelt, 2001, p. 256).

¹⁵ Council for Mutual Economic Assistance (CMEA) states. CMEA was a trade organization from 1949 to 1991 under Soviet leadership

¹⁶ Structural adjustment policies: debt-restructuring operations

While the World Bank and the IMF supported the economic growth of countries in Latin America, a survey by ECLAC quoted in Hoogvelt (2001), reported high levels of inequality and high poverty rates. Further, organizations such as the World Bank, the IMF and the IDB¹⁷ had an influential role in the ideological transformation in Latin America as investors and policy reform counselors in the 1980s and 1990s. Governments too saw the advantages of liberalizing the economies of the countries in a period of rapid globalization. The ideological aspects of the reforms were based on liberalization of trade and privatization (Gwynne, 2004). In education the philosophy was reflected through privatization, decentralization, and the introduction of choice (Carnoy, 2002). The World Bank's faith in market-oriented reforms made them argue that through using this package of reforms, Latin America would change "from a continent of economic despair to one of hope" (Gwynne, 2004, p. 51). When referring to the multilateral organization's agenda, Hoogvelt (2001) points out that the globalization keeps its interests in the Latin American regions, in terms of exploitation of their markets and labor, where the state represents a necessary and powerful tool for this domination.

Transition and the effects on education in Latin America

Data collected by Carnoy (2002), suggests the quality of education in Latin America has decreased due to economic reforms and further globalization. Further, he argues that it is not just a problem of poor performance but of inequality as well, both "among Latin American's national educational system and within countries" (Carnoy, 2002, p. 295). It is clear that the economic transformations in Latin America had a clear neoliberal footprint and that one of the most successful countries in following this philosophy was Chile (Gwynne, 2004). On the other hand, the educational discourse in Chile was driven by a neoliberal and free market ideology which created inequality in the educational system (Carnoy et al., 2007; Hsieh & Urquiola, 2006).

Even if the Latin American transition may have led to different outcomes in the different countries, it is possible to re-construct the cases in an abstract outline. In order to avoid an economic implosion, a package of neoliberal and market-oriented reforms based on a Western worldview in development and progress, can be introduced to reduce the public spending and limit state intervention. Education, as a large public expense, follows austerity measures, hence the implementation of policies such as decentralization¹⁸ and privatization which

¹⁷ Inter-American Development Bank

¹⁸ Could raise quality of education but not when its main goal is to reduce public spending

increase the inequality between educational systems. Carnoy's (2002) analysis goes further, examining how teachers' salaries were impacted by the structural adjustments. According to the author's data, countries that implemented SAPs from 1980 to 1990 show generally that the economic conditions of teachers had decreased.

3.3.2 Post-socialism and global dominance: experiences of transition in countries of the former socialist camp

This section is linked to my research because it explores transitions in countries that once, as Cuba, were part of the Soviet Union. Thus, they have in common the same socialist ideology and the same economic structure. Another aspect that they have in common is the socialist ideology and epistemology behind the educational system; in this sense, it is relevant for my study to explore what happened in the period of transition to the socialist educational systems. Although there are differences as well, as is the case of the countries in Latin America, the transformation which occurred in the socialist states engaged both the political and the economic systems. In Cuba, however, there has been no transformation of political ideology after the collapse of the Soviet Union (Hoffmann, 2001).

Hoffmann, quoting a report from the World Bank (1996), emphasizes how the transformation in the former Soviet Union countries, took place by changing from central planning to a more liberal orientation of the economies. However, despite the uniform political and economic system of the Soviet bloc, changes took place differently due to the characteristics of each individual country (Daun & Sapatoru, 2002). Moreover, Hoffmann argues that a linear transformation as quoted above has not exactly happened anywhere, but rather started to emerge into "hybrid mixed structures" (2001, p. 5). In other words, there was not an immediate change "from plan to market" but the economy and society adapted the changes, which are related to the global forces like neoliberalism to the old socialist structure. In addition, the author stresses how these hybrid mixed structures are highlighted by *informalization* in which

remaining elements of the socialist society, as well as mutual-help relationships among the old party and plan elite, are mixed with the new market structures (Bert Hoffmann, 2001, p. 5).

However, the difficult economic conditions led to an increase of the informal sector, that is, the black market. The transition in former Soviet Union countries happened with the support and pressure of Western international organizations such as the IMF and World Bank, but also NGOs and different national and international agencies (Pickles & Smith, 2005).

Transition in the socialist camp and the effects on education

Daun and Sapatoru (2002) studied how the educational systems of former Soviet Union were affected and restructured after the collapse of the socialist systems. Their study showed that educational change happened with a *laisse faire* (permissive/passive) attitude from the political leaders, because education was not considered a top priority. Thus, depending on which group had a major influence on the territory, whether church or private sector, it has supplanted the control over the educational system. However, they argue that the educational reforms were implemented in a top-down approach quite uniformly across all transitional countries and reforms were pushed by foreign donors (Daun & Sapatoru, 2002). Further, they point out how the concept of equality was not addressed as it was previously under the Soviet influence. Finally, the authors claim that while education in East European countries has continued to be based on human capital theories, pressure on competitiveness and national/ethnic identity has increased.

A specific example of transition in education is given by Niyozov (2001) through the understanding of changes in education in Tajikistan after the collapse of the Soviet Union. In this transitional period, Tajikistan experienced an economic growth through liberalization and diversification of their economy. In his qualitative study, the author looks at the five Tajik teachers in times of transition. He argues that after this period teachers have retained a high commitment to students and educational practices. The school hierarchical system was kept, but at the same time, spaces for change were created. After the collapse of the Soviet Union, teachers lost their high status despite an increased work load. According to Niyozov's (2001) research, the number of qualified teachers moving away from teaching has increased. In order to replace this loss, schools had to hire their own graduates without further qualifications. Further, according to the author, reformers and policymakers often followed the paths of other former Soviet countries (described above). Finally, he claims that policies and reforms ignore the valuable voices of the teachers and their professional experiences.

It seems difficult to have an abstract idea of transition because the experiences of transition show that the processes of transition follow different courses; what they are transitioning to may be very uncertain and with different outcomes in education. However, it is possible to draw some conclusions for this post-socialist transition theory as well. First, it represents a complex readjustment and adaptation of old socialist structures into new structures which are market oriented. These so-called hybrid mixed structures tend to follow a path towards the informal economy and black markets, which consequently bring devaluation of traditional

high-skilled professions, e.g. teachers, engineers, etc. In this context of “informalization” the schools, teachers, and the whole educational system with the addition of neoliberal aspects such as privatization, have to operate. These hybrid mixed structures that appear in education as well may lead to competitive environments and increased inequality.

3.4 Contexts of transition benefitting GAE?

It appears that the effects of transition have an impact on educational systems, i.e. global architecture of education has gained ground. Hence, transitional processes are strictly linked with the global architecture of education discourse. In fact, they are both the effect of globalization, both may be driven by a neoliberal ideology and they have a common focus on the human capital theory. In addition, since periods of transition are consequent of the process of globalization, it occurs that the nation states are weakened. Therefore, the influence and the importance of international organizations are particularly visible not just for the economic profile of a country but for the educational systems as well. Thus, I argue that the nature of these contexts of transition favors the global architecture of education, which represents these globalizing forces around the educational systems.

However, it is important to note the limitations in both the global architecture of education and the transition process. Transition processes are unique for each country depending on many factors; hence, it is difficult to use a general and abstract theory. My attempt to frame the process of transition in Cuba through the experiences of transitions of countries connected with Cuba could give some insights. As the period I am examining, the post-Fidel era is ongoing we do not have the benefit of precise retrospection. For instance, it is easier to get a better understanding of the period of transition that already happened, from 1990-2000.

Regarding the global architecture of education, it is a general framework which above all explains how international organizations are imposing a Western epistemology on the education agenda worldwide. Further, GAE is tied to the argument that neoliberal policies are provoking educational changes. These changes see education as an economic investment and follow educational policies within the principles of quality and assessment. However, the level of implementation of neoliberal reforms and influence from international organizations may vary vastly from country to country. Can we still call it global architecture of education when levels of commitment to market-oriented reforms are limited? Or when the influence of international organizations is unclear?

However, the most important feature of the global architecture of education is represented by the processes of imposition of Western epistemology and consequent homogenization. To balance the power of Western hegemony, Breidlid (2013) advocates for the negotiation of alternative learning spaces where also other epistemologies are valued, accepted and legitimated. However, it does not take in consideration the countries in the Global South that may have lost their link to the indigenous knowledges. In addition, the vision of a space between Western and indigenous epistemology may be somewhat idealistic, as many of the indigenous cultures come in sharp conflict with themes such as vaccination, woman rights etc. Alternatives to balance out the hegemonic role of western epistemology carried by the global architecture of education in places where history may be multilayered is problematic.

4.0 Methodology

In this chapter, I present the methodology used in my research. The chapter contains both the methodological assumptions of the research and the methods employed during the fieldwork in Cuba, from August to October 2015. I will describe the process of gaining access to schools, sample strategy, the methods of data collection, field relations, the issue of reliability and validity, the data analysis method and the limitations encountered in the field.

When looking at the Cuban case, there is the tendency to fall in a dichotomist interpretation, which rests on two sides: the unconditioned support to the revolution and its accomplishments, or the fierce critique of the regime and its oppressive system. The use of the interpretivist paradigm helps my study to not fall in this dichotomy but to lift up my understanding of Cuba since it recognizes the complexity and the multiple interpretations of the world.

4.1 Qualitative and “focused ethnographic research”

The concern of my study is partly to explore the perceptions and experiences of teachers and to “understand their interpretations of the world around them” (Cohen, Manion, & Morrison, 2011, p. 18). Hence, my epistemological assumption is based on the interpretivist paradigm; while my guiding theory and ontological assumption is social constructionist. Therefore, what we know, as knowledge, is always negotiated within cultures, in social settings and in relationships with other people (Berger & Luckmann, 1966).

Since meanings and experiences are not quantifiable this is a qualitative study and to some extent, it could be associated with a specific area of the ethnographic tradition, called “focused ethnography”. This is because it is a strategy applied in particular “research fields specific to contemporary society which is socially and culturally highly differentiated and fragmented” (Knoblauch, 2005, p. 1). Features of focused ethnography are short-term field visits which are counterbalanced through intense and rich data collection. Further, it requires a long work of preparing and analyzing data. Finally I found it relevant to my study because its strategy is to focus on small elements of the society (Knoblauch, 2005); hence, it investigates only some aspects of the society as I did in my research. For instance, when I look at what characterize the transitional period of post-Fidel Cuba, I focus only on the socio-economic, epistemological and technological categories.

In my research, it happened quite often that I had to modify components of the design because of new developments in the study, for instance, merging the findings chapter with the discussion. This is in line with the flexible design of the qualitative study (Maxwell, 2005).

4.1 Access to the field

Before leaving for fieldwork my supervisor warned me about the difficulties of accessing informants in Cuba, based on his research experience on the island. Breidlid (2013) states that in many ways conducting fieldwork in Cuba may be more difficult than in many African countries, e.g. South Sudan, since participants are not comfortable with sharing information. And according to Charon-Cardona (2013) for a foreign researcher, it is still problematic to gain approval to conduct interviews and surveys, and to make participant observations in Cuban schools for an extended period. However, regardless of the fact that you may be labelled as an insider or as an outsider researcher, educational ethnographic research requires a negotiation of access to diverse institutions through gatekeepers (Atkins & Wallace, 2012),.

During the planning of my research before data collection, I was able to establish a relation with two key gatekeepers. The relationships were of different natures; this was also due to the channels I was able to get through them, and their position in the Cuban society. One gatekeeper was contacted through formal contacts via the academic environment and the other through my personal social network. However, in educational settings, identifying the right persons with the power to promote your access is a complex issue (Mertens, 2014). I would also like to add, from my fieldwork experience that in certain contexts even with the right person and with the right power it is not enough to overcome the obstacles in education research such as fear.

The process of requesting access to the schools, granted before the fieldwork started, was difficult, frustrating and expensive. Technical information to prepare the request and get the approval changed many times. For instance, at the beginning I was told that I would need approval of my interview guide. While information about the objectives or procedures of the research is considered appropriate to be shared with the hosting institution, data that could bias the results of the study may have to be withheld (Cohen et al., 2011). The school administrators also gave me conflicting information and told me that in order to visit schools I needed to change my visa¹⁹. The total cost of certificates, changing visa and bureaucratic

¹⁹From a tourist visa to an academic visa

materials (photocopies, photos, etc.) was of around 100 CUC. Later, towards the end of my stay, a male colleague requested the same process to visit schools and was not charged with any fee. The official process to request the visit to schools started in September, and can also be called a negotiating process (Cohen et al., 2011). However, since my time on the island was short (I had to come back October 11th) and since I was starting to doubt the official channels, I decided on an alternative strategy. In order to avoid an exchange of access for personal interests from the gatekeepers, it is suggested to seek a broader source of support (Cohen et al., 2011). On September 1st, I talked to my second gatekeeper and realized I would have to collect my data through formal and informal channels. I will first describe my experience with the informants and the sites obtained through official channels.

Access to the first site, a junior high school, was arranged officially with my first gatekeeper since he was working in a center of research connected with a pedagogical university (called CEPES, “Centro de Estudios para el Perfeccionamiento de la Educación Superior”,²⁰). The 7th of September I was finally able to bring the documents prepared by the research center plus a letter written from the gatekeeper for requesting my visit to the schools to the Ministry of Education. The process of the offices was very slow and I was sent through wrong channels. At the end of the day, my documents were sent to the office of the vice ministry of education. The approval from the vice ministry took another week. When visiting the school the first time, accompanied by my gatekeeper, I was told by the principal that he needed the approval by the provincial office of education. This process was faster thanks to the direct contact between the ministry of education and the province. Nevertheless, it took some time. While the process to acquire the official permission to visit a school was undergoing I dedicated time to field observation, informal conversations and an informal negotiation with another junior high school, in a different area of the city. In this last school, after I asked for informed consent and explained the aims of my research I was accepted as a foreign researcher.

Education in Cuba is highly regulated and some school institutions may be concerned with the potential data that a researcher may get, hence to protect the school’s reputation they may deny access (Atkins & Wallace, 2012). Following this concern, it may be understood why schools need to be careful in letting researchers collecting data, especially in a country like

²⁰ Center of studies for the improvement of higher education

Cuba. In addition, it explains why I was denied to enter to another school in which my second gatekeeper had a personal contact.

4.2 Sampling

My main sample is composed of teachers and “knowledgeable people” about the teacher profession. Knowledgeable people are defined by Cohen et al. (2011), as persons who have in-depth knowledge about the particular topic; in the category of teachers I also include the principals of the schools since they serve as teachers as well. Since I was working within a constructivist paradigm, the sample is a targeted group that does not aim to represent the wider population. However, this sample is the most suited for my research because it will allow me to collect rich and comprehensive information about how the transition has affected the teacher profession (Mertens, 2014).

The school I visited through official permission was chosen by my gatekeeper; the school was close to where I lived so it was convenient. This school could be categorized as a convenience sampling since the informants were selected according to their proximity to the researcher (Cohen et al., 2011). However, the second school I visited was selected through purposive sampling. The reason for this was that I wanted the second school to differentiate from the first school I was assigned on key characteristics such as different neighborhood²¹ and socio-economic environment. However, the most important thing was that the school personnel was available at that time so it may fall into the category of convenience sampling as well (Mertens, 2014). Due to the scarce amount of time, the expenses and most of all the difficulties to access schools, it turned out that the convenience sampling was almost the only way to select schools.

After gaining access to the schools, new negotiations started with the principals; both granted me interviews and class observations, but interviewing teachers was more of a delicate matter. Originally the sample I targeted consisted of teachers of history and civic education teaching students of ninth grade. The reason behind this sample was that I thought history teachers and civic education teachers were the ones more responsible for promoting the official knowledge, compared to other teachers. However, even if the sample request was formally accepted it was not possible to fully access the sample. For instance I was granted access to interview a civic education teacher but the teacher was not present when we were supposed to have the

²¹ For a different perspective on tourism

interview. I realized that the sample of my study might have been seen as sensitive and that the school environment was suspicious towards me. In order to make things easier, I again decided to use convenience sampling. This meant any class that the principal was considering available. However, through a snowball effect, thus using the teacher’s personal contact I was also able to talk to teachers that were not selected by the principal.

Teachers from different urban districts	Ex-teachers who have been re-employed	Knowledgeable People about the teacher profession
Informant 1	Informant 3	Informant 2
Informant 6	Informant 10	Informant 5
Informant 7-8		Informant 4
Informant 9		
Informant 11-12		

Table 1 characteristics of the informants

Further information about the participants will not be provided in order to maintain anonymity (Cohen et al., 2011). For the same reason the name of the city where the study occurred or the gender of the informants will never appear in the thesis.

4.3 Methods for data collection

The qualitative researcher is able to apply a variety of methods for gathering data (Cohen et al., 2011). In this study, I used different techniques for data collection in order to answer the research questions through different perspectives and triangulation. The triangulation, which is the technique of obtaining data from other instruments about the same phenomenon, improves the validity of the study (Cohen et al., 2011). In my research, I used the following instruments for data collection: fieldnotes, qualitative interviews, and a content analysis of school policy documents.

4.3.1 Fieldnotes from participant observation and from hanging around

Fieldnotes are a crucial method of data collection in ethnography and they should be taken and interpreted with the same attention to any other data technique (Hammersley & Atkinson, 2007). Fieldnotes can be recorded both in situ and away from the actual circumstances; further, they carry data from observations (Cohen et al., 2011). The fieldnotes I took in my study are from both participant observation and from hanging around.

Wolf quoted in Hammersley & Atkinson (2007) states that in unreceptive contexts, in which outsiders as foreign researchers are not always welcomed or accepted, the most strategic and useful technique is to “hang around”. This technique comes directly from the ethnographic tradition and it was very useful in order to access teachers with knowledge about my specific topic (Hammersley & Atkinson, 2007). I hanged around the school perimeter, between a class observation and the break or while I was waiting for the principal. Through this technique I was able to meet and talk to teachers that I did not expect to be helpful (plus I was unaware of their position), so I did not consider them in the first place. However, once it happened that while I was hanging around in the entrance of the school and informally talking to a teacher of civic education I was stopped and interrogated by a professor, despite my official permission.

I used the participant observation technique with the purpose to observe teachers in their natural environment, the class, and their behavior. There are different forms of participation in observation; my case is represented by “observer as participant” since I was identified by the group as a foreign researcher²², without so much contact with the group and mainly taking notes about what was happening (Cohen et al., 2011). Although most of the observations were written when I was getting home, some notes were taken also during the class activities. I observed: one TV class of civic education, two classes of history for seventh grade about ancient history, a class of Spanish, a technical class²³, an environment class and a methodology class organized for teachers. Although I was in the school with official permission I was not allowed to observe classes of civic education, because the teachers were students of law (for more information see paragraph: loss of values). During the observations, I was never alone but always accompanied by another teacher, usually the vice principal or the principal itself. Further, after every class observation, I was “invited” to go to the principal’s office to discuss the class and the methods used by the professor. This happened especially in the school where I had the official permission.

Participant observation involves the researcher to spend time on the school activities, taking part in the situations, conversations, share impressions, etc. (Cohen et al., 2011). The participants in the discussions that took place after the classes I observed were me, the principal, and the vice principal (sometimes the professor that held the class but not always). At the beginning I was unconformable to share what I thought about the class and about the

²² Overt Research

²³ Educación Laboral, closely linked to productive work

methodology, but later I got accustomed and it was fine. One of the risks of participant observations is to adopt the behavior of the environment and the group of the study, i.e. “going native” (Cohen et al., 2011). In these conversations, I might be carried away and forgot my role as researcher and felt as I was more of a teacher too (since I am actually a teacher).

While writing the fieldnotes, it is unlikely that the researcher can capture everything; therefore, fieldnotes should have a specific focus (Hammersley & Atkinson, 2007). During the classes, I was giving special attention to:

- The teacher’s behavior in the class
- The spontaneity of the discussions
- Experience of the teacher

However, I was not limited by these themes because whatever I found interesting or relevant I noted it down. The research was overt so it was fine if I was taking notes in situ, however, most of them were completed at home. As explained previously, my original intention was to observe only classes of contemporary history, since that was not possible I had to change the profile of my observations. In addition, I tried to interview teachers after the observations of their class; however it was not always possible. The research project may change the scope and develop over time, thus, fieldnotes may be used or interpreted in different ways (Hammersley & Atkinson, 2007). While my participant observation was not very significant and quite limiting for my data collection, it was a helpful instrument to know the teachers and their behavior in the school environment. Further, through hanging around and participant observation I was able to create a network and a space for my research.

4.3.2 Qualitative interviews

Interviews are a common method for gathering qualitative data in educational research (Atkins & Wallace, 2012). The flexibility of the interview technique allows the researcher to get rich and in-depth data about the phenomenon studied and at the same time it allows spontaneity from the interviewer (Cohen et al., 2011). For these reasons and because I understand knowledge as generated by humans, generally through an interchange of views, I chose to use qualitative interviews as the main source of data collection (Kvale, 1996). The interviews follow the view of social constructivist, in which reality is socially constructed through personal experiences and knowledge production; hence, I recognized that what my

informants communicated to me about their life and their teacher profession was based on their subjective understanding of reality and it could be interpreted in different ways.

When I had the possibility I interviewed teachers right after the observation of their class, through informal and open-ended questions to attempt to establish a relationship with the informant, e.g. “how did you come to be in this position?” (Mertens, 2014). Further, I asked questions that were relevant to the lesson, but only if something was particularly interesting; for instance when I observed a TV class.

Before going to fieldwork I prepared a structured interview guide with specific questions and topics. I thought that from these questions I could get rich information. After the first interviews I noticed how some questions were not regarded as relevant or were too narrow. So I changed them into more open-ended questions. Through this, I might have decreased the focus on selected topics by leaving more space to my informants’ voices (Mertens, 2014). The semi-structured interviews lead to the discussion of topics instead of narrow questions. However, I explored and gave more space to points that might be more important for my study.

I am aware that the interview has a particular limitation which is the power relationship between interviewer and respondent (Atkins & Wallace, 2012). As foreign researchers according to Sidaway (2006), we are by virtue of “work, education and background, in position of power” (quoted in Desai & Potter, 2006, p. 64). Even if in Cuba I did not feel that my background made me “powerful” in any way, the participants may have felt different. So I consider it important to reflect on the power relation of the researcher. In fact, the interviewer, due to its role and objectives may create inhibition; further in contexts where it is not so common to express freely, respondents may feel uncomfortable during an interview. In addition, schools constitute already a formal setting. In order to decrease the power relation and make the informant more at ease, I tended to prefer informal interviews, interviews without audio-recording, limiting my notes and focus on listening and being able to interact with the person if it was necessary. However, I used semi-structured interviews when interviewing respondents that had, due to their role and institutional position, a higher power relation than me (principals, university professors etc.).

Through the contacts of my gatekeeper, I was able to arrange four interviews without using the formal channel. Two interviews occurred at the house of the informants in a very informal setting. The respondents were comfortable because they knew my gatekeeper who

accompanied me. However, two other informants canceled the interviews, one before the meeting and one when I was already at her place. My gatekeeper said that they were too uncomfortable and afraid for consequences.

Informants contacted through	Teachers	Knowledgeable People	Ex-teachers
Formal permission	4	3	1
«Informal permission» (Hanging around)	2	6	3

Tabell 2 Informants and interviews

I used different interview techniques according to the power relation and the setting I was in. I used semi-structured interviews with principals and persons covering institutional positions, I used informal interviews with teachers and knowledgeable people about the teacher profession. The Spanish language was used in all interviews; despite my language skills Cubans tend to speak very fast and Cuban language is not exactly Spanish. A language is filled with cultural concepts and categories. Thus, it is not enough to translate single words; instead, you need to translate both language and culture (Eriksen, 2003). For these reasons, my data may be over-interpreted due to my knowledge of Spanish and not always clear due to the fact of not being native.

4.3.3. Document analysis

Document analysis has been applied to explore current policies through newspapers and official documents around the status of the teachers. The policy document I analyze is titled “Ministerial Resolution” 186/14 (R-186/14) (Ministerio de educacion, 2014). The document outlines changes regarding the Cuban educational system for the school year 2014-15. In particular, I looked at the document in relation to its connection with the status of teachers, e.g. reduction of their working hours. The policy document was easily accessed via the internet after my fieldwork. Other changes in the educational system have been generated and divulged through the newspapers which I collected every day of my staying in the fieldwork.

This strategy also allowed me to better immerse in the new context and directly experience the political discourse of Cuba.

Published documents from governments may aim to examine a particular issue and propose solutions. However, this information should be cross-checked in order to prove the accuracy of the document (Cohen et al., 2011). During my interviews with principals and official voices, I asked and inquired about the information within the policy documents.

The literature I use for my discussion has been selected among the extensive and long-lasting research it has carried out about the Cuban educational system. Carnoy et al. (2007) for instance examine the high performance of the Cuban school system; Cuban students achieve high test scores in international math, science, and language tests. The author's study includes data from Chile and Brazil whose students consistently score lower than Cuban students, on the same tests. Further it underlines that the lower performance occurs despite the fact that Chile and Brazil enjoy better socio-economic indicators than Cuba. The key concept in Carnoy et al. (2007) is the state involvement and commitment to grant education for all.

Breidlid's (2013) analyses of Cuba's academic advantage takes us a step further to understand the Cuban educational success. While the author points out the positive characteristics that differentiate Cuba from the global educational perspective, he acknowledges the problems of ideological exclusion as well. The work of these two authors inspired my decision to conduct fieldwork in Cuba. The studies of UNESCO in Cuba through the global monitoring reports (2005; 2009) also represent an important source for the thesis. Even when contributing with interesting results, it is important to remember that UNESCO plays the role of international organizations and to some extent supporting the global architecture of education discourse. However, it is the only international organization that has included and valued the Cuban experience into broad educational debates (Breidlid, 2013).

When looking at how the political and ideological aspect of the Cuban educational system and the ways they are reflected in the curriculum, I found the work of Griffiths (2009) very helpful. The author, while acknowledging Cuba's academic performance, recognizes the educational challenges due to the recent social and economic conditions and changes (Griffiths, 2009). The same studies of the socialist political formation through schooling in Cuba has been carried out by Charon-Cardona (2013). However, this author uses an autoethnographic approach which gives personal and insightful examples from her experience as a Cuban student.

Finally, Massón Cruz (2015) is a Cuban scholar whose research experience involves the application of a Marxist focus in comparative education studies, in the Cuban and Latin American context. When I was in Cuba I had the opportunity to meet her and have a class on her studies about the education system in Cuba and the concept of quality. The author's critical approach comes from her formation and professional experience in Cuba as an educator, and through the influence of Marxism-Leninism in Cuban education. In addition, from the professor I received documents and information (through the class, where I was also able to make questions) that I used as Cuban literature in the discussion.

4.4 Field relations

According to Hammersley & Atkinson (2007), field relations may vary from setting to setting; and, it is important for researchers to make some considerations about their role in the field, the challenges, and ethics that may have an impact on the relationships in the field. In the next sections I will describe my position as a researcher in the field.

4.4.1 Field roles

As a white person from the global north conducting research in Cuba, I was struggling to gain access to schools. In general, I felt I was suspected of having a hidden agenda. It came up more than once as a joke that the reason I was in Cuba was because I was a spy from the US. The joke made me laugh and made me feel better, however, I am not sure if it was so far from what people thought about me. On the other hand, the school I requested access to informally, granted me immediate access; that may be also related to me coming from the global north.

In order to improve field relations, personal appearance can be an important factor (Hammersley & Atkinson, 2007). My personal appearance did not help; I was considered dressing too much as European. A principal told me that in order to be more integrated to change my hair style and dressing style more as a Cuban girl. In a place where Western people are easily spotted out because of the strong tourist component, it is an advantage to not look too Western/European. The researcher should be reflective and take gender in consideration; however, it cannot take much action (Hammersley & Atkinson, 2007). In the site of the research, harassments to women and in particular white women if they are by themselves like I was are twice as high. The reasons are related to the consequences of the tourism industry, e.g. jineterismo (prostitution). The area in which I was situated and conducted fieldwork was safe, the risk of being robbed or attacked was very small; nevertheless, tourism may have spoiled the place's image. However, I did not change my

European style, my research was overt and I did not need to use camouflage in order to hide my role. I wanted that informants could trust me for who I was, for my politeness and my open attitude, despite being an outsider.

The period of my fieldwork was also characterized by a lot of international attention. When I was in Cuba the US embassy reopened, and in September Pope Francesco was visiting, and in addition Cuba was the host and strategic peace facilitator between Colombia and FARC. These historical moments that appear great in the media, represent a lot of stress for the population mostly because of the police control was higher.

4.4.2 Ethics

As explained above, my research was overt and carried from an outsider perspective. This means that I informed the participants about my research, allowing them to further take part or withdraw at any time during the process of data collection (Cohen et al., 2011, p. 210). However, as Hammersley & Atkinson (2007) point out, researchers “rarely tell all the people they are studying everything about the research”. The informed consent was not always applied in very informal conversations during informal settings; although my role as a researcher was always very clear. Further, for researchers it could be challenging to inform participants about the whole study since themselves do not know everything (Cohen et al., 2011). At the beginning of my fieldwork, the topic of my research was still very broad; I narrowed it down only after my data collection.

Once I was on the bus with my gatekeeper, he was telling me how poor and manipulated people’s knowledge about some historical sites of the city was. He started an argument with another man that overheard him. He was very uncomfortable but glad because I experienced that. Whereas researchers move on with the study and eventually leave the country, gatekeepers live the daily consequences of the research (Cohen et al., 2011); however that moment was not really the case where I might have put my gatekeeper into a vulnerable position.

4.5 Reliability and validity

The quality of a research should be estimated by its own paradigm’s terms (Marilyn Healy & Chad Perry, 2000). Guba and Lincoln propose four criteria for judging the quality of qualitative research: *credibility, transferability, dependability and confirmability* (quoted in Mertens, 2014). I will attempt to address some of these criteria in order to prove the validity and reliability of my study.

Credibility comes from several criteria; one is the duration of the engagement in the field. Since my fieldwork lasted nearly two months I was able to collect sufficient and rich data. It is proved by the extensive quotes, from my interviews, used in the discussion chapters. When it was possible, participants checked the content and ideas that derived from the interviews, in order to verify the accuracy of the account (Cohen et al., 2011). However, it was not always possible to involve the participants, for two reasons. Not all the participants are aware of the required validity of research process and they do not always have the time for that. Second when I used the audio recorder I did not always had the time to transcribe the interviews in situ. Since in Cuba, e-mail and internet is a privilege I was not able to present the final transcriptions of the whole text. However, when there was enough time, at the end of the interviews I summed up what had been said during the interviews. Further, the method of triangulation is useful when it is necessary to connect and check the consistency of the data. For instance, triangulation occurred when I checked through several interviews and class observation whether the policy document R-186/14 was applied in the schools and how.

While quantitative research may be more concerned with validity in order to obtain generalizability, qualitative research is more concerned to prove validity depending on the degree to which data and interpretation are appropriate to the study and may be transferable to others (Mertens, 2014). Through thick descriptions and rich information about the context and the study site, the reader may judge whether my study is different or similar to their own. The explanation and the understanding of the context of transition in education, for instance, might fit other similar post-socialist cases, thus it could be helpful to better understand other transitional contexts. Yin quoted in Mertens (2014, p. 272), points out how “the use of multiple cases can strengthen the external validity of the results”. In my study to generate an abstract model for the transitional context I use the support of several cases: the Latin American transition and the transition which occurred in the former Soviet Union countries.

Dependability is the capacity of replicating the same study over time and obtaining the same results. Because of the nature of qualitative research which finds its study on the singularity and unicity of the situation, the study cannot be repeated obtaining the same data (Cohen et al., 2011). Especially in my study, which focuses and frames the research in a specific period of time, which is the implications of particular political and economic events. The trustworthiness of the research may be found in other aspects, e.g. triangulation. Further confirmability, understood as objectivity, may help to increase reliability. In fact, according to Mertens (2014) confirmability proves that data and their explanations are not influenced and

generated by the researcher. The researcher then has to make clear the logic used in the interpretation of data. However, being an objective and unbiased researcher is a challenging, if not impossible task.

4.6 Data analysis

This paragraph describes the process of data analysis which gradually began when I started to collect data in Cuba. In qualitative research there is no single way to do data analysis but it follows the role of fit for purpose (Cohen et al., 2011). From the beginning I looked at the raw data, and I tried to identify and organize patterns and themes highlighting the important material that derive from the fieldnotes, interviews transcriptions and observations. Further through coding the data I tried to synthesize and group them in order to generalize. This first step of my analysis is labeled as thematic coding (Saldaña, 2013). First, I found four groups of categories; later when re-coding I merged two categories because they were overlapping. According to Saldaña (2013) it is completely normal during the qualitative analysis to use the coding process more than once. I framed my categories only after deciding on the theoretical framework. When I first looked at my categories, I did not have a strong theoretical framework; directions for ideas were pulled from the data, as it is suggested in Figure 1. After that, I looked at the literature and moved to the current theories; thus my research followed an inductive approach.

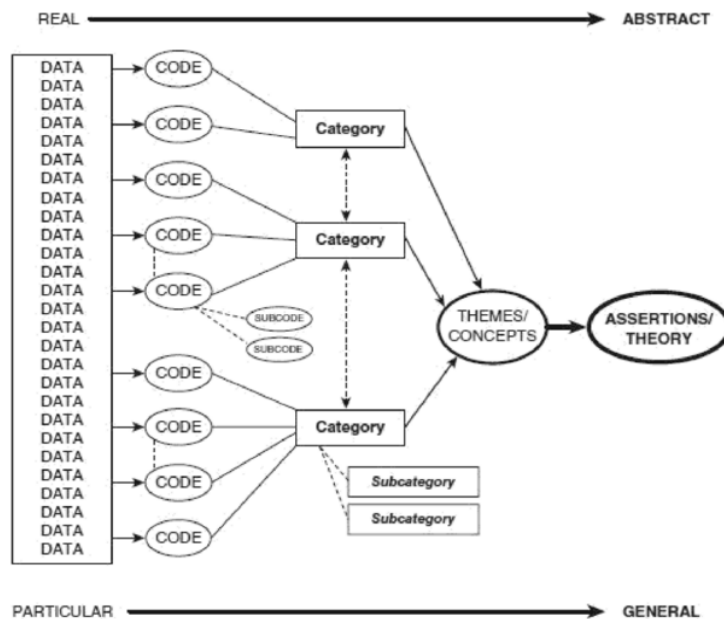


Figure 1 streamlined codes-to-theory model for qualitative inquiry (Saldaña, 2013)

From the coding of my raw data I came up with three dimensions: socio-economic, epistemological and technological. The concept overlying these categories was the one of transition which led me to globalization as the main theoretical framework. Through the lenses of the theory, I then moved back to my findings chapter, in the attempt to lift up the discussion.

4.7 Limitations

At the beginning of fieldwork the researcher, as Hammersley & Atkinson (2007, p. 79) point out, is “faced with the practical need to make sense of a particular social setting”. My fieldwork suffered from the common limitations of a novice. However, I was aware of being inexperienced so I watched, listened and asked questions anytime I felt it was necessary.

Although I might have been naïve and new at my new role as researcher, when I arrived in Cuba I already had my assumptions about the Cuban socio-economic and political context. My assumptions were based on a particularly positive perspective on the Cuban education and society. Not just from the literature but also from the fact of having a “left and socialist” family background. In addition, since I was a student I have always been politically active. However, I was able to be critical with my preconceptions and I think it reflects in my thesis.

Not as a limitation but as a clarification I would like to point out that the goal of my research is not to generalize, but to explain how a particular period of time affects education. Further, the study is set in an urban environment because it is most prone to change. Hence, my knowledge and my background might have influenced the directions of the study.

One clear limitation that comes up along the methodological chapter is the struggle to access schools. However, it is not possible to generalize this issue for the whole Cuban context. My fieldwork was conducted at the beginning of September when the schools had just started, and ended in October. The time is probably too short to claim that Cuba is a difficult country to do research.

5.0 Discussion

In my discussion I have integrated the findings from my fieldwork in Cuba. My findings include document analysis, observations, interviews and fieldnotes. My discussion chapter is structured around the research questions and divided into two sections. The first section is more literature driven whereas the second is more data driven. In the first section, I engage myself with the literature, bringing relevant academic authors to the discussion. These authors have conducted extensive studies on the Cuban educational system; some of the scholars are from Cuba and some of them are from the international academia. Through their work, I will identify the key features of the Cuban educational system. Moreover, in the discussion I will look at the Cuban educational system through the different lenses of the global architecture of education. I will explore whether the key features of the Cuban educational system are in line with the GAE.

In the second section the focus will move to the possible changes in the status of the teacher profession. Three dimensions of transition emerged from my findings and consequently resulted in: socio-economic, ideology related and technological transition. Data from this section give a fairly recent picture of the effects of *transition* on education compared to some other authors, e.g. Carnoy et al. (2007), Unesco (2009). Therefore, to some extent, it may differ with what has previously been argued about the status of the teacher's profession. Since I argued that transition contexts more likely seem to benefit the GAE, in the theory chapter, I will finally examine to what extent this is the case for Cuba.

Section One: discussion of the Cuban educational model

Considering the features that characterize the Cuban educational system I will discuss to what extent these features may also be recognized in the *global architecture of education*. As explained in the theory chapter, GAE is an educational discourse promoted by international institutions which may attempt to impose a neoliberal policy and ideology on education. GAE excludes other knowledges in its educational agenda, imposing a Western epistemology. From this point the first research question emerged:

To what extent do the features of Cuban educational system differ from the features of the global architecture of education?

I will start my discussion by using the studies of Cuban scholars like Massón Cruz (2015), informant 9 which represents the department of UNESCO's educational program in Cuba; and international scholars like Carnoy et al. (2007), Breidlid (2013), Griffiths (2009), UNESCO (2005; 2009) and Charon-Cardona (2013). Through their work and perspectives, I will explore the unique characteristics of the Cuban educational system. In this discussion distinctive features of the Cuban educational system will be presented and compared with the ones that are characterized by the global architecture of education.

5.1 Features of the Cuban socialist education

The Cuban socialist education has multiple distinctive features. In Gasperini's (2000) study for the World Bank, some of the successful aspects of Cuban education are listed, e.g. continuity in its education strategies, sustained high levels of investments in education and a comprehensive and carefully structured system. However, according to Breidlid (2013), when educational aspects are considered in a study, they tend to give a lot of attention to materialistic aspects, e.g. amount of school resources or technological devices. In other words, these studies could fail to address some of the issues that for instance characterize the global architecture of education, like epistemological issues. I will discuss the features that characterize the Cuban socialist education, and I will try to avoid a positivistic approach by focusing on the ideology and epistemology behind the Cuban educational system and not just what makes it successful.

My discussion will first explore the ideology and epistemology behind the Cuban curriculum. Then I will explore the role of cultural and social capital in the Cuban educational system and how it is affecting students' performance. Further, I will discuss the critical aspects that may emerge by the ideology behind state-generated social capital. I will continue focusing on how the Cuban educational system differs from the GAE. For instance, I will reflect on the features of the culture of performativity and the human capital approach that characterize both the Cuban educational system and the global architecture of education.

5.1.1 The epistemological foundation of the Cuban educational system

Reflecting on the origins of Cuban education, it is possible to understand its epistemological foundation.

In the 19th century, in Cuba, begin to emerge a highly educated class of Creoles²⁴ that left to European and US colleges. However, their culture was always put at the service of the Cuban nation, adapting these knowledges to the Cuban reality (Massón Cruz, 2015).

In this context, the Cuban bourgeoisie imported the European and US vision of the world to Cuba. One example may be the spirit of independence that characterized the thinking of authors like Martí and the whole Cuban history and legacy. This meant following the educational values that came from the West as well. For instance, the minister of education and pedagogue, Jose Varona, during his term at the beginning of the twentieth century, advocated for

maintaining a secular and scientific vision of the Cuban education; since its approach was based on a positivist approach, pragmatism and Pestalozzi's "escuela nueva" imprint" (Massón Cruz, 2015).

The Cuban epistemology is clearly derived from the Western knowledge production.

However, the western epistemology in Cuba's education system is not a result of the driving forces of global architecture of education. The origins of the western epistemology can be traced back to the period of Spanish colonization like in most Latin American countries, followed by US neo-colonization. These periods of colonization preceded the global architecture of education. As any country in the Global South, Cuba, around the 16th century was colonized. Through colonialism, the hegemonic western epistemology and its scientific foundations succeeded to be implemented in Cuba as well.

Further, through the heavy Soviet influence of the 1970s the epistemology continued keeping a western orientation. There was a strong emphasis on Marxism-Leninism theories which belong to the Western world. Griffiths (2009) points out how "the conception of students' communist formation was frequently defined as promoting the development of a materialist or scientific conception of the world" (Griffiths, 2009, p. 51). In addition, the Soviet economic

²⁴ children of Spaniards but born in Cuba, so Cubans

support was coupled with educational commitments by Cuba as well. This was also the case for other countries of the socialist camp (Massón Cruz, 2015). The commitment adopted in education followed the Soviet Union educational model, which especially brought a “high influence on the pedagogic plan though the ideas of Vygotsky and Makarenko, scientific method in education and German mathematics” (Massón Cruz, 2015).

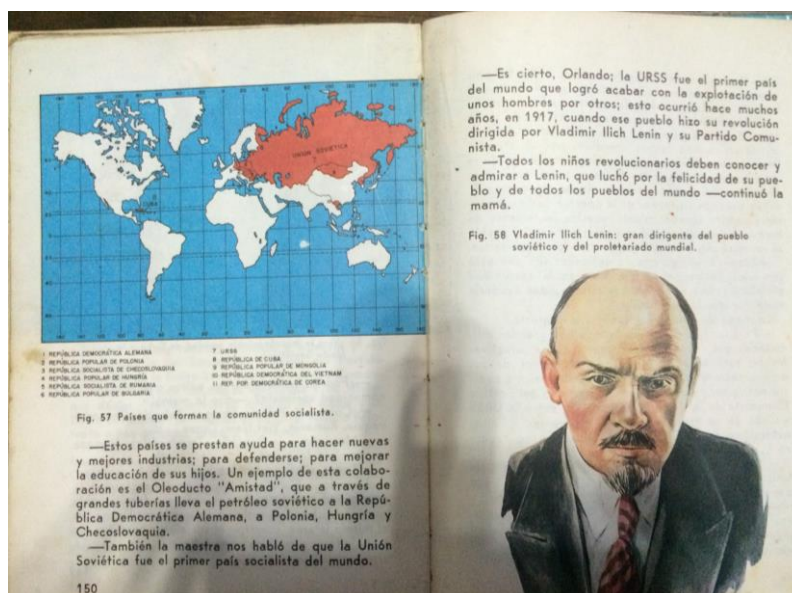


Figure 5 A Cuban primary school book of the early 90s

Despite the transformation of the society that took place in the 1990s, Massón Cruz (2015) suggests that the *educational process* continued to follow its socialist principles which are based on the right to high-quality education for all: “education para todos con calidad”. This important aspect of Cuban education is carried through two important dimensions: the strong relation between the school and the Cuban society and the development of the pedagogical science, inherited by the Soviet system (Massón Cruz, 2015), although according to Breidliid (2013), there was an epistemological reorientation after the end of Soviet influence.

In conclusion, from the literature it appears that the Cuban education is based on western epistemology which is in line with the global architecture of education; however, the western epistemology was imposed through colonization into the Cuban system.

5.1.2 The ideological foundation of Cuban educational system

Ideology is highly emphasized in the Cuban educational system (Breidlid, 2013; Griffiths, 2009). An example of this emphasis could be found in some of the priorities of the curriculum:

- 1) Accomplishing a good and prepared school environment
- 2) Ideological education, marked classist character of education²⁵ and values²⁶ - to form patriots and revolutionaries
- 3) Establish a relationship between the schools and communities (Massón Cruz, 2015).

The second priority of the curriculum is directly related to what in Cuba is called *integral education*. Integral education means the development of patriotism and revolutionary values, the respect for national heroes like Martí, Che Guevara, and Fidel Castro and the rejection of capitalism (Griffiths, 2009).

Charon-Cardona (2013) discusses the effects of the integral education, which means having compulsory political courses in the curriculum. The author, who has studied in Cuba, admits that integral education has damaged her perceptions of the Cuban education. Further, using the curriculum to impose a hegemonic ideology may in principle resemble the global architecture of education's imposition of neoliberal ideology²⁷. In addition, if the curriculum imposes a hegemonic ideology, it may exclude those who disagree with the regime. This exclusion contrasts with the principle of inclusiveness that is supposed to distinguish the Cuban educational system (Breidlid, 2013). Below I will present how Cubans are able to deal with this ideological imposition, according to some scholars.

An important aspect of the curriculum, argued in the theory, is its relevancy which means that education follows the interests of the local contexts. According to Breidlid (2013, p. 161) the Cuban educational system, in particular through the curriculum, focuses on “domestic principles”. These principals are represented by what Kapcia (2005) calls *Cubania*, a set of ideological beliefs typical of the Cuban historical tradition of dissent and struggle which started with Spanish domination until the cold war and the US embargo. These sets of codes that represent Cuba's historical legacy and ideological foundation are part of the integral

²⁵ In Cuba the school system does not reproduce class differences, model from the Cuban revolution

²⁶ Universal values like solidarity, becoming like Che Guevara.

²⁷ Consumerism and capitalism

education discussed above. In addition Gasperini (2000) and Breidlid (2013) point out the fact that even school material like textbooks are developed locally. The foundations of the Cuban curriculum are based on the traditional values of the country, thus on anti-colonialism, anti-capitalism and anti-Western.

Through the promotion of these ideologies, Cuban education represents a unique alternative to the global architecture of education and its unquestioned western ideology (Breidlid, 2013). Breidlid points out how exclusion of “the thinking and acting of the majority of the people in a country, that is, their cultural expression” can damage school performance, self-esteem and self-confidence (Breidlid, 2013, p. 65). Compared to the experiences of other countries in the global south, e.g. South Africa, Cuba’s curriculum seems to respect its people’s cultural history and expression. For instance, parts of South Africa’s curriculum are “modelled on a Western discourse, depending heavily on different international contexts, especially from New Zealand and Australia” (Breidlid, 2009, p. 144). For this aspect, the curriculum in Cuba differs from the global architecture of education.

Cuba has a western knowledge system, but what contrasts the Cuban educational system is the clear focus on an alternative ideology which promotes anti-imperialism and anti-colonialism. However, in practice, these ideologies and political principles are questioned by the last period of transition; in practice the economic changes and the increase of neoliberal policies are deviating from the Cuban ideology.

In the next section, I will also explore another aspect of the Cuban ideology that might be considered critical, i.e. the ideological imposition on the Cuban population that leaves little space for alternative ideologies.

“La doble moral”

When I was in Cuba, schools were about to begin their regular school year. I was highly recommended from my gatekeeper to go out early in the morning and gaze around the city; according to the gatekeeper, I should pay attention to the large number of students from any grade and the parents’ commitment. My gatekeeper told me that the first day of school was not just about the students but the parents as well.



Figure 6 First day of school

When talking about the first day of school, Informant 9 referred to it as an “acto central”, for the Cuban society:

The ministries²⁸ of education appear on TV and give speeches; they send the messages of the essential elements and priorities for the school year. Not only in television but also in the national newspapers like “Granma” and “Joventud rebelde” the government messages, interviews and so on appear (Informant 9).

From my observations and the informal conversation with parents, the first day at school was particularly special: politicians were giving speeches, parades were organized, and so on. As informant 9 stated, the first day of school is a central moment in the Cuban society but it is also a moment to display the official ideology. This phenomenon is part of what Griffiths call “overt politicization of schooling” (2009, p. 51).

The downside of integral education is the state’s use of formal education as means for persuasion and indoctrination, and thus social control. This social control may be supported by a soon sixty-year-old hegemonic ideology, socialism, which shapes the people’s belief and dictates how to make sense of the world (Aguirre, 2002). On the other hand, when the author Charon-Cardona (2013), through an auto-ethnographic approach, reflects on her education in Cuba, she suggests that the ideological indoctrination failed. According to the author the failure of the indoctrination was:

²⁸ Ministry of education and Ministry of higher education

due largely to the way some lecturers taught the courses, and their dogmatism and forced recitation of ‘historical facts’, coupled with students’ disinterest and political immaturity (Charon-Cardona E, 2013, p. 305).

The author’s claim is in line with my observations in the Cuban school. For instance, in the next chapter I report how a school teacher in a history class was explaining how Cuba is a socialist country and thus has an equal system. Students answered negatively, as a natural reaction, when asked if Cuba was an equal society; despite being taught that Cuba is an equal society. However, these examples may not be enough to evaluate the success or failure of the ideological imposition. Whether the Cuban ideology through the educational system succeeds or fails to be imposed is difficult to state. However, from my experience and from the literature it seems that this ideological imposition under the Cuban socialism is compromised with the *doble moral* (double moral).

The double moral is generated when two sets of “discourses and standards” are negotiated “between the official discourse and lived experienced” (Charon-Cardona E, 2013, p. 308). This phenomenon involves all Cubans, but in particular the new generations (Blum, 2011). Cubans are aware that, for example, they should behave differently according to the setting they are in (Blum, 2011). Therefore, if they are in a public setting, they will behave according to the official norms and if they are in a more private setting they will adopt informal codes of behavior. However, the negotiation process and the capacity to adopt different codes do not imply the acceptance of them (Blum, 2011). The “doble moral” could also be developed as a reaction to the contradictory capitalist economy introduced in the Cuban socialist system. This contradiction is also reflected between the government’s official ideology (socialist) and its neoliberal measures in practice (Blum, 2011). However, neoliberal measures have until now only been implemented in economic reforms in Cuba.

On one hand, in the Cuban educational system, education is offered to everyone at no cost; in addition, the state takes great care and interest in everyone’s education. However, differences based on access to education have increased since 1980 (Charon-Cardona E, 2013), especially based on race (Breidlid, 2013). On the other hand, the use of education as an instrument to reproduce or establish a political system and ideology, explicitly or implicitly, is an aspect that cannot be left unnoticed. The instrumental use of education is an aspect that does not concern only Cuba, but so-called democratic countries as well. It seems like there is always a risk that the group that is controlling education, whether that is a ruling class or the state, will push their agenda. The most concerning aspect in Cuba is the “forceful imposition of the

hegemonic discourse, leaving almost no space for alternatives discourses” (Breidlid, 2013, p. 156).

5.1.3 State-generated social capital vs. cultural capital

In my theory chapter, I emphasize the apparent importance of cultural capital to achieve success in education, and how cultural capital is a feature of the global architecture of education. The right cultural capital is when the knowledge from your home environment allows you to succeed in education because knowledge from home and from school coincides (Carnoy et al., 2007). If a student belongs to a lower class or uses a different language at home than in school, the student is less likely able to achieve the same educational success (Breidlid, 2013). In educational systems where the level of cultural capital determines an individual’s school success, social class matters (Bourdieu & Passeron, 1990). Since the Cuban revolution, the hegemonic class is represented by the political elite of the communist party. Hence, the right cultural capital needed in order to achieve advantages and higher social mobility within the system is related to the ideology of the hegemonic elite. However, later in the discussion chapter I will present that Cuban students performed well in international tests. This could imply that either everyone has the right cultural capital or that cultural capital is not the only factor determining school performance.

As I stated in the theory, social capital is the capital generated by the family’s and the community’s involvement in the child’s education. This may mitigate the challenges for some social classes that are arising with cultural capital. Social capital can be concretely exemplified by this phenomenon:

The week before the beginning of school there is an enormous effort from teachers, students, and families to help painting/cleaning/fixing schools and getting ready (Informant 9).

In fact, Cuba has gone one step further creating what Carnoy et al. (2007) call state generated social capital. This is one of the main reasons why Cuba’s educational model has been considered a special case. The author suggests

“states can generate just as potent a form of social capital in promoting educational achievement as family can, and that state generated social capital is essential to improving the educational achievement of low-income groups - those that have the least cultural capital and the most difficulty in acquiring and accumulating social capital on their own” (Carnoy et al., 2007, p. 12).

Cuba's *state generated social capital* makes education not only accessible for all but also a successful tool to perform well in education (Carnoy et al., 2007). State-generated social capital is a concept which helps to explain why Cuba performed better in assessment tests than other countries in Latin America (see also Unesco's (2005) global monitoring report, "*The quality imperative*"). Carnoy et al. (2007) explore different aspects of the Cuban education and why Cuba represents a unique educational environment. In this context, students are not only supported by the parents and the local communities (social capital) but also and especially by the state (state-generated social capital). In this way, Cuba, apparently, has mitigated the potential obstacles of Bourdieu and Passaron's (1990) cultural capital for low-income groups. The home environment in Cuba does not have the same influence on student's achievement. This is the case because through the equal support of the state every student has the same educational opportunity.

Informant 9 explained that from 1961 all private schools were closed and the Cuban state took charge of all the education expenses, such as schoolbooks, school material, teacher salaries, etc. In addition, for Carnoy et al. (2007), the involvement of the state is not merely economic, but it is followed by a package of policies to enhance a stable and equal educational environment.

Hence, there is a difference in the reproduction of social classes between the global architecture of education and Cuba. In fact, in Cuba, state-generated social capital mitigates the power of cultural capital giving the same opportunity to free education to any social class. The majority of the countries in the global south do not have the same involvement of the state in education. As explained in the theory, under the influence of international organizations, e.g. the World Bank, the governments of the Global South tend to reduce the public spending and limit state intervention in education. Therefore, they may have taken a neoliberal approach towards *educational policies and services*, e.g. through privatization. This educational discourse is part of the global architecture of education. Thus, GAE, through education, benefits the classes that have the right cultural capital; in addition, privatizing education tends to exclude the lower-income groups altogether. Carnoy et al. (2007) use the example of Chile to explain the inequality created by market-oriented models of education. The author explains how more privatized educational systems in Latin America, like Chile, fail to achieve the same school performance as Cuba. The market-oriented models of education do not create the same positive educational environment because they are based on

competition, like capitalistic markets. Moreover, through market-oriented educational policies, the countries spread social inequality.

The human capital approach in Cuba

In this section I will briefly discuss a possible critique of the state-generated social capital that may be relevant when considering the human capital approach in Cuba's educational system. In the theory I presented how some international organizations such as the World Bank, through their educational reports²⁹ and recommendations seem to promote and focus on human capital development rather than on education's foundational goals. As reflected in the theory, human capital theory sees education as an investment. This investment is crucial for individuals and nation-states to achieve economic growth.

State-generated social capital, comes from the notion of social capital and it is based on a socialist ideology (Carnoy et al., 2007). However, it appears that state-generated social capital focuses as well on economic development. UNESCO (2005) quoting Amadio et al. claims that Cuban education clearly emphasizes the link between education, life, work and production. Further, Griffiths (2009) argues that mass schooling, i.e. the total coverage education offered by the state, is intended as preparation for work in order to advance and develop the economy of the island. According to the author mass schooling in socialist countries has the same instrumental goal as that of a capitalist country. Hence, to some extent, state-generated social capital appears to converge with the global architecture of education's vision. However, in Cuba, the state invests in education not just following a human capital approach. Education is as well considered as a right for every individual. Above all, education is seen as a fundamental instrument to learn about the Cuban ideology. The state-generated social capital has clear focus on equity and equality that does not coincide with the capitalistic vision of education.

While it seems that education is distributed equally through the state-generated social capital, there is a "lack of economic incentives and rewards for the well-educated population" (Bredlid, 2013, p. 167). This is also due to the economic policy restrictions. On one hand, the Cuban salary system does not follow the assumptions in line with a capitalistic labor market because higher education in Cuba does not lead to higher wages. On the other hand, since the beginning of the transitional period, Cubans' life is in practice driven by capitalistic policies

²⁹ For instance, WBES 2020 "*Learning for all*" (World Bank Group, 2011)

and ideologies. For instance, they might need higher salaries to buy goods that before were not available in the market-economy. The critical aspect might be represented by the fact that lower salaries may divert people from education and people may consequently undertake alternative strategies in order to overcome economic challenges.

5.1.4 Culture of performativity in Cuba and the role of UNESCO

In this section I attempt to find out whether Cuba has the same approach to the culture of performativity as the global architecture of education. As presented in the theory, the culture of performativity can represent a feature of the global architecture of education. The culture of performativity emerges in school contexts affected by neoliberal influences; hence, it sees education as an investment in which “productivity and efficiency” should be monitored (Ball, 2003). There are several concerns associated to the culture of performativity; however, my study is concerned with the fact that a culture of performativity may promote a specific dominant culture, i.e. western monoculture.

Education in Cuba has played a vital role in the post-revolution discourse. As a result of nearly sixty year of commitment to high quality education and universal adult literacy, education represents one of the revolution’s most important achievements (Carnoy et al., 2007). As discussed in the theory, governments may use the test results for internal policy goals (Steiner-Khamsi, 2006). Therefore, for the government it can be fundamental to show and prove the high quality of Cuban education. Further, the commitment to quality and equality of education has also put Cuban education in an unprecedented spotlight by UNESCO. From the official voices³⁰ I interviewed, one indicator of quality in Cuban education is the “cobertura total”. It means full coverage of student’s education (Massón Cruz, 2015).

The quality of education in Cuba was proved by standardized tests ran in two strategic periods. The study was conducted by ORELAC-UNESCO both in 1995-1997 and 2004-2006 (Gasperini et al., 2000; UNESCO, 2008). The first tests were run in a context of the “special period” (see background chapter) which was characterized by a severe economic crisis. According to several informants, the Cuban government, despite lack of finance, did not close schools and did not lose its focus on education (Informant 9). In 1998 UNESCO published the reports of surveys in mathematics and reading in which Cuban students showed results above

³⁰ From public and international Institutions

the students from other Latin American countries (Gasperini et al., 2000). Cuban students showed the highest level of achievement in Latin America (14 regions). In 2006, the economic situation improved and the study again reported how Cuba exhibited the highest performance levels in mathematics, reading, etc. among the 14 Latin American countries (UNESCO, 2008). Informant 9 pointed out that Cuba accomplished the Dakar EFA³¹ goals a long time ago, making Cuba one of the few countries of the global south that is committed to the “Education For All” goals (Informant 9).



Figure 7 Entities participating in SERCE survey in 2006 (UNESCO, 2008)

In this case, UNESCO is the sponsor of Cuba’s quality of education at an international level. Why? And for what purpose? I will discuss why this is and for what purpose in the next section.

International organizations like UNESCO may exercise power on governments through technical actions (Barnett & Finnemore, 2004). Categorizing the world may represent one of these actions; in fact by classifying countries according to their outcomes in international assessment like SERCE, UNESCO may pressure governments to introduce educational reforms (Barnett & Finnemore, 2004). There is however no evidence of UNESCO pressuring the Cuban government into educational transformations. In addition, praising an educational system that does not follow a neoliberal vision of education is a step forward for an

³¹ Educational goals that aim to meet the learning needs of all children, youth and adults by 2015, e.g. improving comprehensive early childhood care and education etc.

international organization. UNESCO, through testing frames indicators and benchmarks that are legitimizing what is considered best to develop in the educational systems worldwide (Barnett & Finnemore, 2004). It seems as if UNESCO, by framing indicators and benchmarks is supporting the homogenizing process in the educational practice. This may affect the countries of Latin America where the tests are applied, like Cuba.

Massón Cruz (2015) is quite critical of international testing and argues that Cuba does not participate in PISA, PIRLS, TIMMS, etc. for different reasons. The first is that participation requires a payment. The second relates to the sets of skills that these tests value: memory and behaviorism. On the experience of Cuba, participating twice in a laboratory in Latin America³², the author comments

The preparation took a lot of efforts from teachers, parents and kids - it was not worth to use all the energy only to prove that we were first (Massón Cruz, 2015).

As discussed in the theory, the standardized tests do not consider the personal history of the students and communities, cultural differences and conditions. They are black boxes, the questions only accept one kind of answer. Further, since the questions are planned by international frameworks, school is no longer representing the place where you are educated as a citizen and human being, instead, the school becomes a place that prepares for tests. These assessments and standard setting techniques fit very well in educational systems who adopt private approaches to education (Steiner-Khamsi, 2006). One of the consequences of this market-based approach is to transform schools into competitive environments. On one hand, this approach, according to Massón Cruz, is incompatible with the *integral education* of the individuals in Cuba, discussed above in the curriculum. On the other hand, Cuba still performs much better than any other Latin American country.

In Cuba quality is defined, amongst other, as the total coverage of the students' education; while standardized tests were used to prove the high educational performance of Cuban students (by UNESCO) they were not used to instill competition around the school environment. On the one hand, official voices are critical in connecting the quality of

³² Survey conducted by OREALC, the UNESCO regional office for Latin America and the Caribbean.

education with the culture of performativity. In this sense, Cuba differs with the global architecture of education, which sees education as an investment to compete in the knowledge economy. On the other hand, tests ran by UNESCO in Cuba may be used to promote a specific Western monoculture which is in line with global architecture of education's agenda worldwide.

Section two: the impacts of transition on the teacher profession

In this chapter I use my findings to explore the status of the teachers. The data from my fieldwork in Cuba included formal and informal interviews with teachers and principals as well as data from official documents. I will combine these findings with class observations and the official document, R-186/14, to discuss how the transition of post-Fidel has affected the status of the teachers.

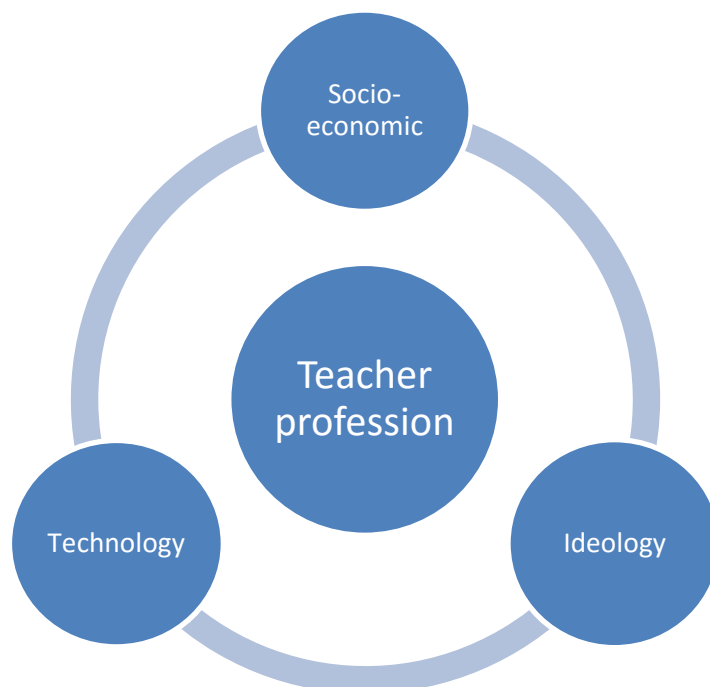
The overall picture of my fieldwork in Cuba could be synthesized by several experiences of transition. These experiences are driven by the process of globalization which started in Cuba around the economic crisis of the 1990s. For the country, facing the economic decline meant including global impulses such as tourism, internet, western values, etc. in the socialist system.

I base my understanding of the Cuban transition on the perspectives of Pickles and Smith (2005) and Hoffman (2001): Transition, rather than being a straight-forward process changing from one hegemonic system to another, is composed by a complex revision of old social relations in order to construct a new socio-economic project. From the data gathered in my fieldwork I found that the patterns of transition were related to the status of the teachers. For the purpose of a clearer and more systematic organization, the data collected in Cuba was then grouped along dimensions which indicated a relation between the patterns of transition and the information about the teacher. The three dimensions are: socio-economic transition, ideological transition and technological transition. These dimensions emerged at the transcription stage in the attempt to better map the findings. From this stage the last research question emerged:

To what extent has the status of the teachers been impacted in the transitional period of post-Fidel?

Figure 8 represents a conceptual framework that I created in order to illustrate the specific concepts I used to organize my discussion. Further, these three dimensions of transition represent three different ways in which the teacher profession may be affected. While the technological dimension is providing a new overview in the Cuban context the other two have already been extensively studied. It appears that the dimensions have originated in different periods and they are linked differently to the teacher profession. The socio-economic dimension is more closely related to the conditions of the teacher; for instance, how changes in teacher salaries influence teachers at a personal and professional level.

Figure 8 conceptual framework: teachers and the dimensions of transition



The official knowledge represents the ideology behind the Cuban educational system and it is rooted in the Cuban revolution of 1959. Since then it has shaped the Cuban curriculum, objectives, and practices. However, the introduction of a more capitalistic system in the 90s produced some changes in how the official knowledge was received. The official knowledge dimension is connected with the political nature of the education. Hence, it is concerned with the role of teachers as an essential part of the official knowledge and how this is delivered to the students. It explores how teachers deal with the new changes that affect the students. According to Blum (2011), while the old generations felt betrayed by the government the younger generations have developed a double moral. The study, taking into consideration the

recent changes of post-Fidel Cuba, explores how the changes may impact the younger generations and consequently the teachers. Are the teachers delivering the same official knowledge despite students being aware of a different reality?

The technological dimension is also connected, as is the official knowledge, with changes in the society. Internet is for instance one of the main consequences of globalization. Internet may represent an alternative source to the official knowledge; what are the general implications for the teachers?

The dimensions are interconnected as well. Socio-economic and technological dimensions are both a result of globalization. Further, the transition from official knowledge is affected by both harsh socio-economic conditions and exposure to technology. In addition, the socio-economic dimension also affects the spread and the use of technology; better socio-economic conditions are more likely to increase the access to technology. These dimensions represent the ongoing transition occurring on the island, which is affecting the Cuban society and the teacher profession. In the next paragraphs I attempt to explore the extent of this impact.

5.2 Socio-economic transition

The socio-economic factors are understood as part of the social and economic struggles that teachers face in the daily life. According to Griffiths (2009), these real life conditions creates incongruence with the official values and ideologies promoted by the Cuban socialist model. Further this incongruence foster “illegal and individualistic behavior that exacerbates the divide” (Griffiths, 2009, p. 55). Relevant elements that are part of the real life conditions are: informal economies as sources of additional income, illegal activities, faster and devalued teacher training.

5.2.1 Entering the informal economy

According to Padrón Hernández (2014), when describing if a job is good or bad Cubans do not mention the salary which is pointless. The most important thing is to be able to get a hold on valuable goods. Informant 2 frequently mentioned:

Who works in an almacén³³ owned by the state, always keeps some goods, most of the time to re-sell it in the illegal market (Informant 2).

The teacher profession is however, different from other jobs. It does not give access to any valuable goods, and at the same time salaries are low. Teacher salaries are an important aspect of the real life conditions of the teachers. Despite the increase of wages in 2009 (from 3.6 to 4.8 CUC³⁴, depending on the level of responsibility in the educational sector), the average salary of teachers is still very low: 21.36 CUC³⁵ per month (Betancourt, 2009).

According to Pickles and Smith (2005) a dramatic drop in real wages and increase of poverty have been proved to be common patterns in transitional periods. It seems as if this type of contexts encourages people living in harsh conditions to use particular coping strategies such as entering the informal economy, for instance by trading food and other basic products. In this case, networking is key. Networks established through work or community is fundamental in order to make the ‘informal economy’ function. Another coping strategy is the increase of activities that are illegal or in the grey area of the law (Pickles & Smith, 2005).

During informal conversations with parents about the quality of education, they challenged my argument on the quality of Cuban education with the experiences of exam frauds. According to them, the level of fraud and corruption regarding the illegal purchasing of exams has escalated in the last five years, to the extent that not even “Granma”³⁶ could avoid reporting the scandals. The most known scandals happened at the high school level, where entrance exams to universities were sold, and at university level, where an exam was bought by medicine students (Granma, 2014). The same high school professors were also accused of giving private classes, despite its illegal nature. After the scandal several teachers who were discovered giving private classes were expelled from the educational system.

Alternative forms of income (including remittances, the black market, and self-employment) provided massively higher levels of compensation compared to remuneration for traditional labour, thus contributing to a greater acceptance of activities once considered illegal (Lancaster & Sanyal, 2013, p. 39).

³³ warehouse

³⁴ same value as dollar

³⁵ Within this amount there is the obligation to pay 5% to social security

³⁶ The official newspaper of the communist party

As stated above, teachers in Cuba are not allowed to give private classes which could offer additional income. Not having an easy way out, the survival strategy that teachers may adopt to increase their low salary, if they do not have any hold on valuable goods, is then illegal. Another important point is the transformation of a socialist society through the globalizing forces: while some parts of society get wealthier others fall into poverty (Pickles & Smith, 2005). While teachers have very low salaries, there are other parts of the society that through tourism or informal economy are prospering. This transformation of society makes the wealthier parts of society keener to use their power or leverage on the poor part of the society such as the teachers. An example of that is given by an episode happened during an interview with the principal (Informant 1); the interview was stopped because there was a fight between three girls over a Facebook matter. Involved in the issue there was also a professor. When talking about the issue Informant 1 repeatedly stated:

I always say to the professor: do not mix each other (...), do not hang out with the students or parents. If [the parents] invite you to their summer house, or to have beers do not go, I do not mix myself with anybody. (Informant 1)

The problem apparently was that a teacher in questions became friends with some students and parents and was involved in the Facebook fight for this reason. When I asked why teachers do that, the principal replied:

There are the needs that professors have that bring them to do that, those who have a little bit of purchasing power buys the teacher in one way or another; those who let themselves tempted. This happens everywhere (Informant 1).

Informant 2 explained to me that the economic constraints of a teacher are so big that it “forces them to do unethical things”. Inequality and poverty must not be understood as absolutes. There are many layers and stages; processes of transformation started in Cuba in the 90s. Some had an immediate impact and some had visible consequences only later. However, in the post-Fidel era, the status of the teachers appears particularly affected by the globalizing forces that moved the transformation of the Cuban society. Because of their economic situation they may need to use illegal strategies and because of their weak position they may be taken advantage of, as informant 1 pointed out. The role of the teachers

according to the Ministry of Education Ministerio de Educación, quoted in Griffiths (2009) is fundamental. Teachers are responsible for the ideological and political formation and are identified as

implacable defenders of Marxist-Leninist ideology and socialist morals in all aspects of life (Griffiths, 2009, p. 51).

The teachers' mission and role as promoters of socialist values is then weakened, by biases and by adopting illegal strategies. Moreover, following the understanding of Freire (1998) around the role of educators, teaching is seen as a holistic practice in which:

The teaching of contents implies that the teacher be also grounded ethically. The beauty of the practice of teaching is made up of as passion for integrity that unites teacher and student. A passion that has roots in ethical responsibility. (Freire, 1998, p. 88)

Since teachers are not just responsible to transfer knowledge but also to instill values and ethics, e.g. through leading by example, the real life conditions are affecting the role of the teachers.

5.2.2 Reduced enrollment for teacher education

Due to the poor prospects of the teacher career many students may prefer to opt for other alternatives, if the school results allow it. As I mentioned in the background chapter, the normalization of diplomatic relations between US and Cuba benefitted the industry of tourism. According to Granma (2015), from January to July 2015, US tourism increased by 54%. Tourism is a business that started in the special period and therefore it is not something new to the Cuban society. However, the growing number of US tourists has created and will create more job opportunities in a sector which has higher access to CUC currency. In addition, teachers are suited to work in the tourist industry due to their language skills (Goldstein, 2012). When I asked the responsible for the “official programa de educacion Unesco”³⁷ (informant 9), whether tourism affected the quality of education he said:

The most influenced [by tourism] are teachers. But not just by tourism, also in general the opening up, like self-employment. Teachers tried to improve their life style and their salary and they went to work in other sectors. So the country has a deficit of teachers which was mitigated by what was possible to supply. But one thing is clear, we have not closed any schools! (Informant 9)

³⁷ Responsible for the official program of education at Unesco

The deficit of teachers, which have left the educational system for more lucrative jobs, seems not to be compensated by an increase of students in the pedagogical university. Figure 9 shows that the numbers of students in the Pedagogy University have dropped between 2006 and 2011. The total figures show that students might drop the option of higher education altogether. Informant (4), told me that some male students may choose teacher education only to avoid military school. The teaching career may not be considered as appealing as it used to be before, students might prefer other careers.

The government has proposed for the next school year, 2016/17, new forms of incentives in order to increase the number of students in pedagogy. The strategy also has the aim of selecting the best students. The strategy rewards students that won prizes in education by admitting them directly to the faculty of pedagogy without any admission test.

Figure 9 Number of university students per year from 2006/7-2010/11 (Oficina Nacional de estadística, 2010)

RAMAS DE LA CIENCIA	2006/07	2007/08	2008/09	2009/10	2010/11
Total	658 134	743 979	710 978	606 863	473 309
Ciencias Técnicas	37 935	42 741	46 054	42 773	39 871
Ciencias Naturales y Matemáticas	3 812	3 922	4 075	4 441	4 550
Ciencias Agropecuarias	12 952	16 034	17 365	14 394	11 661
Ciencias Económicas	80 577	93 162	82 003	57 836	47 056
Ciencias Sociales y Humanísticas	175 106	205 992	195 404	150 326	113 284
Ciencias Médicas	159 526	187 690	188 534	189 069	148 483
Pedagogía	128 062	125 095	113 473	94 649	67 935
Cultura Física	58 677	67 578	61 624	52 148	39 099
Arte	1 487	1 511	1 486	1 227	1370
Facultad Preparatoria	-	254	960	-	-

5.2.3 2001-2002 teacher policy training and its implications today

Teachers' image was also damaged by some policies that impaired the quality of their training. In a report from OEI³⁸ (2003) about teachers training in Cuba, it is explained how in

³⁸ Organización de Estados Iberoamericanos: Organization of Iberoamerican states

2001-2002 there was a transformation in the graduation process - it became “faster”. According to Carnoy et al. (2007), teachers of lower-secondary school through an intensive two-year program, one of normal academic courses and one of supervised teaching practice, became the *integrales generales*. The reasons behind this law are several: (1) teacher shortage due to tourism and (2) the decision in 2001 to have only 15 students per class in junior high school. Informant 5 whose position was involved in training integrals generales teachers, explained to me the procedure and the duration of their education.

They [students] were going directly to the schools to work in the junior high schools during the week and in the week ends they were studying. I worked days and nights because in addition I had to visit them at night, I was preparing them on the educational level. I had to go with them to the schools, visit them in the schools, and give them classes (Informant 5).

In addition, the informant explained that they were recruiting students from other cities to bring them to the capital where there was high need of teachers. Further, through these changes, there was only one professor for every subject, a part from English and physical education.

However the principal I interviewed in the school (without official permission) (informant 1) told me that in 2011 the project was stopped because students in high school got very bad grades and were struggling to enter the universities. All these measure taken in the Fidel Castro era, contributed in recent years to form the image of educators that are not enough prepared. An image that may not be far from the truth, if you consider what a teacher told me:

The teachers I help with methodology classes are all formed as *integrales generales*, they come from other provinces because here [city] nobody wants to be a teacher. These young teachers are very nice but they make severe grammar mistakes in the spelling (orthography), in the diction of the words etc. They treat their students as friends and the principal as a peer. Moreover they lack the vocational element that makes a good teacher (informant 3).

She added that parents are not happy with the quality of these new teachers and they complain about it, they do not respect the teacher figure like they used to do before. Educating teachers in a shorter period and at the same time pretending that they would be knowledgeable in all

subjects except English and physical education has somehow started to ruin the image of the teacher portrayed by UNESCO (2005). “*The quality imperative*” report of UNESCO which praised the special status of the teachers dates back to 2005. Another report on quality followed; “*Overcoming inequality*” by Unesco (2009), reports a SERCE³⁹ study in 2006 within Latin American which shows that:

Cuban students outperformed those from other countries in almost all subjects and grade levels (2009, p. 111).

While performance still is very high compared to other Latin American countries, the status of teachers has changed considerably.

Further, in 2014, the Ministry of Education through a new policy, R-186/14, decreased teachers’ hours in class in order to use them for preparation time (Ministerio de educacion, 2014). This measure did not affect the teachers’ wages. A principal explained to me during the interview:

The R-186/14 wants to achieve a greater openness to the community with greater interaction of the students in the related Institutions of the community. E.g. more time to go to the museum, workshops, visit to the retired fighters, athletes. Second it gives more time of preparation for the teacher. The preparation of the teacher is fundamental, if the teacher is not prepared it is not a teacher. The visits are handled by the voluntaries from theses circles. It gives more time than the current 8 hours (for the teacher) of preparation (informant 6).

New teachers, or teachers educated as *integrales generales*, are followed by an experienced teacher once a week (informant 3). The experienced teacher (informant 3), would help the less experienced teachers to prepare their classes and find the proper educative strategies to implement according to the individual capacities of the classes. However, while I interviewed informant 3, the informant pointed out the teachers’ weaknesses and deficits. This may affect the teacher status as it makes it more vulnerable. Parents would not accept teachers making mistakes and that might be the reason why the relationship with students is more peer-like, which is already the case in many countries. It might appear from the findings that the teacher status has been affected in the post-Fidel transitional period. The teacher career is not seen as it was seen before because of some gaps in the preparation of the teachers.

³⁹ Segundo Estudio Regional Comparativo y Explicativo

5.3 Transition from the Cuban ideology

..Ideology is the motor
For advancing and overcoming
And as far as ideology is concerned
For us it is always the 26th ...

As this part of the poem from Carlos Puebla⁴⁰ illustrate, the dominant ideology in Cuba builds on promoting the successes of the revolution and the equal system created after the dictatorship of Batista. However, the status of the teacher is decreasing because the Cuban ideology that they are preaching in class does not reflect the reality that students are living. In this section I will explore how the transition may affect the status of teachers because despite their undiscussed role as guardians of the official ideology, teachers may find some divergences with what students experience in their real life.

Every school in Cuba is dedicated to a martyr of a revolution: poems, quotes or facts from the revolution are exhibited in the school's walls. The exposure to the ideology arises also in extra-curricular activities through the Organization of the pioneers of Jose Martí (O.P.J.M). This organization promotes environmental and sport activities but at the same time it teaches the principles of communism.



Figure 10 picture in the left shows a quote from a Cuban revolutionary leader and in the right the symbols of the O.P.J.M

⁴⁰ Cuban poet writes about the 26th of July. The date represents the first attempt of Fidel Castro to attack Batista government.

When I interviewed teachers of history (informant 10 and 11) I asked them how it was possible to explain abstract values such as anti-colonialism and anti-imperialist to students of junior high. They replied:

We explain that through examples, explaining how the capitalistic system works and the difference with us (informant 10 and 11).

During the interviews teachers were not acknowledging the fact that capitalism or neoliberalism had been introduced in Cuba. In the two classes of history I observed they were teaching how the Stone Age society was organized equally, and how the introduction of “technological skills” in the Bronze Age developed inequalities. Further they were comparing the equal system of Cuba to the equal system of the Stone Age.



Figure 11 a history class about the passage from Stone Age to the Bronze Age

One of the goals of Cuban education is to preserve socialism. One way to achieve this is through a political and ideological education⁴¹ (Lancaster & Sanyal, 2013). In the next section I identify three themes: the loss of values, exposure to western values and inclusion of private initiatives in education. They describe how the higher exposure of western values is affecting the status of the teachers.

⁴¹ Integral education, see background for further information

5.3.1 La Perdita de los valores - The loss of values

A common debate in Cuba nowadays is “la Perdita de los valores” which means the loss of values; in 2013 Raul Castro for the first time, in an official speech to the Cuban parliament reported the phenomenon:

We have learned with grief, after more than 20 years of special period, the increased deterioration of moral and civic values, such as honesty, decency, shame, politeness, morality and sensitivity to the problems of others (Castro, 2013).

Further the president continued speaking for the school system and stated:

The same goes for the different levels of education, where (...) some teachers teach classes dressed incorrectly and there are cases of teachers and family members involved in acts of academic fraud (Castro, 2013).

This last critique directed at the educational system may indicate that schools are failing to achieve some of their fundamental objectives⁴² that were established in the 1960's, after the revolution. In response to this phenomenon, the government through the R-186/14 increased hours of civic education. When I was in the junior high school (with official permission) I informally talked with students of law that helped compensate the deficit of educators, teaching civic education.

The faculty of law was not involved in the process, even if from this year professors of universities have campaigned harder to put attention on how we need to help and support the schools. This is because we have a deficit of teachers. It happened also previous years but this year it was much more resolute (informant 7).

They told me for the first time about “la crisis de los valores” and how their task was to reignite the importance of the right values. Since they were studying the constitution and different law codes they said they were the most suited to cover that topic. When I asked about the content of their program they replied

We talk about economic rights e.g. blockade but in a basic way in order to make it easier for students to understand. I have noticed that they are still very small to understand certain issues, they think only to play. We also talk about violations of

⁴² The objective of the Cuban educational system is to prepare the man for life, through an integral education: intellectual, scientific, technical, political and ideological, physical, moral, esthetic, polytechnic and military-patriotic.

international rights at an international level. But they are sometimes too busy with mathematics test and they are not paying attention. Also it can be a boring topic and to me it is difficult to keep the attention (informant 8).

Further when I brought up the topic to other informants, they described the phenomenon as loss of socialist values, as for instance informant 2, stated:

The patterns or models which society has tried to foster among young people are unreachable, like everybody should be a patriotic leader; these ideals and objectives are very distant for these kids, in many senses. On the other hand, the economic situation is so critical that being a professional⁴³ implies a lack of the basic resources for making a living with decency. What motivation do these kids have to study? (..) They prefer to carry suitcases or being a doorman in hotels than being a professional. This has its price and the price is this crisis of values, because being uneducated is a merit (informant 2).

According to Kapcia (2005) after the collapse of the Soviet Union, there was the fear that the principles from the Cuban revolution would start to stumble. The concern for disintegration of society and rise of corruption brought to a “re-examination of the roots” of the revolution (Kapcia, 2005, p. 403). This re-examination of the roots is, for the author, the real essence of Cubania, the capacity to evolve through time and be accepted by new generations maintaining its coherence. This process was possible through the re-examination of moral codes, intrinsic of the Cuban nature. These codes are the belief in education and the belief in morality (Kapcia, 2005). The era of post-Fidel is probably challenging the codes of Cubania. Since education has lost its prestigious power, less people are enrolling in universities and less people consider education a valuable sacrifice. President Raul Castro’s speeches, the increase of civic education hours in schools and a general emphasis on moralism may be part of a set of new efforts from the government to renew the consciousness about the importance of education. In the next paragraph, I will elaborate how the exposure to western values and its progressive influence on new generations may impact the role of the teachers as educators.

⁴³ Have higher education

5.3.2 Exposure to Western values

Another way to exemplify how the socialist ideology has been weakening in the Cuban society is the Cubans exposure to the western culture and the “capital dream”. Informant (5) through informal conversation shared the experience of having a son who thinks differently:

My son left Cuba because I was not able to convince him that ideologically this was a good place to live. He says that he needs a car, a house and here in Cuba he will never get it. I do not own a car, I own a small place, and I do not own what most people would aspire as welfare. I value education as welfare, for my son it is not enough. Studying at the university is not the most important; the most important is having money to buy stuff. The young people who have this option emigrate. We have a dramatic emigration of the young generations because we do not have a development that satisfies them (informant 5).

And then the informant added:

There are very few people of my age that do not have their son and daughter abroad. Revolution invested in education but the educated people that were formed are not willing to sacrifice their lives for that. A lot of athletes, doctors and professionals coming from the countryside, that now live abroad, they would never had the opportunity of an education if it wasn't for the revolution. This is due to the fact that they were born in rural areas, abandoned areas with nothing (informant 5).

Another example that indicates a change in the understanding of socialism as official knowledge is given by a teacher professor in the school (without official permission). During the activities of preparation a young history teacher of ninth grade told, a bit embarrassed and a bit surprised, an episode happened while they were studying the aborigines in Cuba. She explained that she was describing how the structure of the Stone Age society was organized which according to the Cuban vision was egalitarian. Further, she asked her students what kind of system exists in Cuba today, and they all answered: socialism. Then she asked if in Cuba like in the Stone Age, there is social equality; nodding to suggest the answer. This time students replied negatively. According to the methodology teacher, it looked like they responded intuitively.

It is clear, the kids are from the 9th grade, reality hits them, and even if they are teenagers what they are experiencing is too tough and strikes them⁴⁴(informant 3).

This case represents how automated repetitions of historical facts, as processes of indoctrination, fail to educate but rather may spoil the faith and support for the system (Charon-Cardona E, 2013). In addition, according to Breidlid (2013) introducing a capitalist economy in socialist Cuba brought disinterest to the revolution's principles and values. The meanings attached to the revolution followed the same process as the economic liberalization. The loss of values and the exposure of western values contributed to develop a parallel ideology to the one of the government. New generations, who did not live during the period of the revolution but lived during the period described above by Breidlid (2013), may find it harder to commit to the same codes as Kaptcia (2005) was talking about: education and moralism.

Teachers on the other hand, continue to be committed to the official ideology, focusing on socialist values and the importance of education. The role of teachers in the era of post-Fidel will be more difficult than before because of a higher exposure of western values than before. New generations may feel they do not belong or they may feel indifferent towards the socialist values and anti-imperialistic ideologies that are being taught. However, if an honest dialogue between the students and teachers would be established as Freire (1998) advocates, it could be different. An honest confrontation with the class through a critical and knowledgeable overview of all the perspectives would probably heighten the relationship between the teacher and the student. But as long as there is no real dialogue, teachers may not be able to reignite into the students the meanings of the roots of the revolution and its anti-capitalist profile.

5.3.3 Inclusion of private initiatives in education

Finally, another factor that may represent a transition from the past is the presence of private initiatives in education. In my interviews I asked how global forces like tourism might affect the educational system. I almost always received a negative answer. Since the school of the director I interviewed was located in a tourism crossroad, I asked directly, what kind of relationship the school had with the hotels in the area. The director explained that the hotel close by the school was giving a gastronomy workshop, part of the extra activities regulated

⁴⁴ The school is situated in an afro-Cuban area and is characterized by low income families

by the R-186/14. The fact that a hotel, which represents the essence of tourism, is taking space in student's education represents an important factor of the transitional process. The school I visited (without official permission) also runs workshop and activities with an artist of its neighborhood.

The artist is famous for his Afro-Cuban art and has gained popularity due to tourism and often collaborating with schools. While I was interviewing the director, the artist showed up asking for paint and I introduced myself to him and he explained that he was fixing some drawings he did for the school. When I asked the director about the artist she just mentioned his work in the school but without giving it any importance. The collaboration between schools and private entities symbolizes a change in the ideological perception of education because private initiatives were not allowed in the educational sphere previously. It could be part of the process of compromise that Cuba had to start due to globalization.



Figure 12 the entrance of a school, painted by a famous artist of the neighborhood

Another aspect that represents transition in the era of post-Fidel is the presence of religious institutions and private initiatives for the preparation of students. Like small businesses also private courses were allowed from 2010, but not for teachers active in the public educational system. This phenomenon is related to two facts. First, due to the improvement of the relationship between the church and the Cuban government in the last couple of years, the former was allowed to give private courses on condition not to use them for religious purposes. When I entered in the office of a religious institution, offering courses just close by the church, I could read a list of all the courses they were offering: language courses, computer courses, mathematics, administration of small companies and many more. The

responsible of the center told me that soon they will give courses to prepare for entrance exams to universities. The second factor is represented by the parents who feel like the school is not enough for the education of their kids.



Figure 13 English private courses (Falcón, 2015)

According to Carnoy et al. (2007), market-oriented approaches to education are not proved to be successful; on the contrary these measures may be ineffective and promote inequality. For instance, low income families may not be able to afford to pay for private classes if their children would need it. It would be a prerogative only for some families that have access to CUC. These changes may harm the state generated social capital, since some students have more support than others, through private courses.

5.4 Technological transition

The reason I included this section is related to the new technologies that have been introduced in Cuba, especially the internet. Internet may serve as a source of alternative knowledge that may discredit or devalue the teacher as knowledge producer and the ideology of the educational system.

In the 21st century the use of technology in the sector of education has become very popular. While there are no empirical studies that can prove its benefits, the current official discourse of education promotes the use of ICT (Shields, 2011). The support for ICT, especially in developing countries, is based on the modern and western belief of technology as a marker of progress and development. According to Tucker (1992) this belief reflects on the perception of development as the only way to achieve knowledge, status, evolution. The investment of ICT in education is strictly correlated with economic growth:

technology in education is treated as a specialized or concentrated allocation of resources; while it is at odds with the perceived need for mass basic education, it serves the greater good of economic growth through the development of human capital (Shields, 2011, p. 87).

In this section I will illustrate how the perception, the access and the use of technology has changed in the post-Fidel period in Cuban society and Cuban education. Further, I will examine if this technological transition introduced through the internet, smartphones and computers has had an impact on the status of the teachers.

5.4.1 Wireless Cuba

The government lifted the ban on mobile phones in 2008 and since then the island gradually become more wireless. Many Cubans nowadays own mobile phones, smartphones, tablets and computers. A smartphone, considered as a status symbol, is a very important gadget to own by the young generations. However according to Sánchez (2012), a famous Cuban blog activist, after the 2008 reforms it was not possible to find laptops in the shops with prices less than \$2,000 and a PC without a monitor for about \$900. When shopping (food stores who sell in CUC sell technology as well) I never saw a laptop or keyboard. But when I asked the informants if they owned a mobile phone or computer they all answered positively. Some of them got it when travelling abroad, some in the illegal market.

On the other hand, during my visits to the schools I saw the principal (informant 6) scolding and punishing a couple of kids because they had the smartphone with them which is not allowed. When I interviewed both principals (informant 6 and 1) they talked about how in 2001, schools were all equipped with computers and televisions thanks to an educational transformation program⁴⁵. Through this educational transformation teachers were supposed to teach in all subjects and they were supported with technological equipment (Breidlid, 2013). Informant 6 alluding to the technological investment exclaimed:

Can you believe the level of a high-class investment that Fidel did at a technological level? (Informant 6).

However the new resolution R-186/14 decreases the computer hour to only one per week. At the same time the same resolution keeps the “TV classes” which are used for art class, history class and civic education. TV classes are lessons in which the class watches a video on a selected topic by the teacher. Then there is a debate. I observed a TV class for civic education.

⁴⁵ the same reforms as teacher training and unique teacher for the whole portfolio of subjects

The audio and the image was of such poor quality that when kids were asked what the video was about they had no clue, and not because they were not paying attention.

The Cuban educational system has been very careful in the use of media. However, back in 2001, as informant 6 stated the government has invested in technology and introduced it to the schools. Technology was in that case, prioritized compared, for instance, to raise teacher's salaries.

5.4.2 Developing Internet?

When asked if the new exposure to internet was affecting students' education, both principals answered that internet was not affecting students' education. Since technological devices such as iPad, smart phones are more and more available for the whole Cuban population, informant 6 (principal) explained to me that in schools they are educating families in understanding how much time they should dedicate to the exposure of technology. This, in order "to not forget the Cuban values delivered through the integral education" (Informant 6) by the teachers.

On the other hand the other principal, informant 1, told me that only few students have access to the internet and then she added "but look what Facebook did to those girls" (informant 1) recalling the fight over a matter of the social media. Informant 1, when asked about the use of internet, admitted to have an illegal mail account. If discovered, she would be fined. In addition, they openly talked about the use of Facebook to communicate with family abroad. Finally several teachers express that they would like to improve their ICT competences on a personal basis (handle e-mail, Facebook etc.). However, the schools have not internet yet and having internet at home is too expensive for the majority of the Cubans.

It appears that ICT and Internet may represent an alternative source of knowledge that may replace the function of the integral education. However, internet is still too slow, expensive and difficult to access to have such effect.



Figure 14 People trying to access the Wi-Fi on a popular Cuban street

In the city, the hot-spots where you can access Wi-Fi are increasing, the only problem is that one hour of internet costs 2 CUC and in the illegal market even more. Still a high cost for a country where the average salary is 20 CUC per month. Despite the prices, many people sit along the street to catch the signal and to get connected to the web, as figure 14 shows. Even if the prices of internet do not decrease, new applications that work also offline might anyway progressively raise the users of technology in the following years.

According to the responsible for the “official programa de educacion Unesco”, (informant 9), one of the future goals for Cuban education is to orient and instruct people in order to use the computer and “communicate through information technology”. Further, he concluded that the process will be called media and computerization literacy. Recalling the massive literacy campaign run in the 60s, where Cuba was able to eradicate illiteracy especially in the rural areas, it may be natural to think that a similar campaign could happen again but through internet and computers.

Technology worldwide is changing the face of society, in Cuba this process is still in its early stages. For this reason the status of teachers may not yet have been affected by the new technologies because the island have not yet experienced a massive media invasion like the rest of the world (a part from North Korea). However, even if ICT is presented as a tool for teachers, it represents a source of public spending that is quite substantial for a country where teachers earn 26 CUC per month. However, if the internet, and ICT in general will be the new focus for the future educational agenda, as informant 9 mentioned, they could further

represent a source of alternative knowledge that may discredit or devalue the teacher as knowledge producer and the ideology of the educational system.

6.0 Conclusions

Since the revolution Cuba has been a socialist state which offers free and equal education for everybody. Despite the proximity to the US, Cuba was able to resist the western ideology economic and cultural neo-imperialism imposed by the West on the rest of the world. However, the economic changes of the 90s brought the island to a period of transition. The purpose of my study was to explore the implications of these changes on the Cuban educational system and on the status of the teacher profession, focusing on the last transitional period, the so-called post-Fidel period.

In the periods of transition, the island had to gradually and informally give up its socialist principles to introduce a capitalistic system. The island cannot longer claim that it is completely different from the west. Because of the capitalist system and neoliberal policies that have been introduced in Cuba. In addition, from my discussion it appears that the Cuban educational system is based on western epistemology. Although Cuba's ideology is based on domestic and socialist principles, the ideology has been challenged on the island since the 1990s. In the post-Fidel period this challenge continues since the neoliberal approach seems to prevail.

I argue that globalization is affecting the educational system and the status of the teacher profession. Tourism, which is the main focus in many studies, is not the only factor that should be considered when explaining how the Cuban educational system is affected by globalization. My research considers additional factors of the transitional processes. Through this approach I was able to find that the challenges for the Cuban educational system are not only related to teachers moving towards the industry of tourism; they can be found also in the decrease of the status of the teacher profession.

For the teachers, the post-Fidel transitional period is characterized by harsh economic conditions and a parallel informal economy which limit the teachers' purchasing power. This restriction may push teachers towards illegal strategies such as exam frauds. The teacher profession is particularly vulnerable because its role as representative of integrity then can be questioned. Further, how can teachers look after marginalized students when they are marginalized themselves?

In Cuba, ideologies such as anti-imperialism and anti-capitalism are fundamental for the legacy of the revolution. However, through the process of transition, new values are

challenging the Cuban society. New generations do not have the same faith in education as their parents used to have. The salaries for a highly educated person cannot compete with salaries of the informal economy or tourism, which are both expanding.

It appears from the discussion that teachers are now more challenged, since the Cuban values from the revolution are not the only values circulating in the Cuban society. Exposure to western values through the internet, for instance, is one of the consequences in the post-Fidel transitional period. Previously tourism was the primary source of exposure to western culture, now it is happening through ICT as well. The location where the research took place, Wi-Fi spots were available. Crowds of people with laptops, smartphones and tablets were assembling near the Wi-Fi areas. Hence, in this last period of transition, the increased use of technology and the increased access to internet may accelerate the spread of western culture and values. This may increase the gap between what is the official knowledge at school and the western values from the internet. The new challenge for the teacher is to then revive the meanings of the Cuban values into a modern context.

The Cuban educational system still puts high priority on the aspects of quality and equality of education. However, it has to find compromises in order to not increase inequality, e.g. private courses in education. The main success of the Cuban educational system is to deliver free education for everyone. The importance to schooling which started almost sixty years ago has shaped Cuban values, giving high importance to education and consequently high demand for teachers.

It seems like the process of transition puts the teaching profession at risk. If these processes that affect the teacher profession are not stopped or mitigated somehow, the problem will continue. However, ending these processes would mean to be isolated again, since it is not possible to limit and control processes that come from globalization. It appears that the only solution is to accept the change and find new strategies for the educational system. As stated above, the Cuban educational system is a well-functioning machine which has been delivering high-quality of education for decades.

A solution may lie in finding compromises, in order to not sacrifice the factors that contribute to make Cuba such a unique model. The state-generated social capital, for instance, is one of the key concepts that can explain Cuba's academic advantage (Bredlid, 2013; Carnoy et al., 2007). State-generated social capital may be weakened due to the processes of transition that may increase prospects for neoliberal policies in education. Cuba does not receive any

financial help from international organizations or NGOs yet; hence it is still independent and safe from any neoliberal impositions. Further, in Cuba, critical voices are still powerful and capable of finding alternative solutions to the neoliberal path represented by the global architecture of education. Above all, from my findings and discussion it is clear that the teacher profession cannot be sacrificed further.

Since my research is recent, some of the findings of my thesis contradicts the findings of Carnoy et al. (2007) as I found that the status of the teacher profession is decreasing. And to some extent, to Breilid's (2013) findings as well, since the Cuban education system, in many ways, is gradually adapting not in theory but in practice to the global architecture of education.

6.1 Constants

In addition to the experiences of transition that have been presented throughout the study, I have observed some constants as well. As a matter of fact, I perceived that feelings and experiences like fear, pressure and control still persist in the process of transition. Fear of saying something wrong, fear of showing up for an interview in your own house or declining an interview has characterized my Cuban experience. Moreover, forms of control in the school environment are persisting and to some extent subtle. The school I was granted official permission to, was more careful about me than the school I was granted unofficial permission to. The director always knew where I was and what I was doing, even outside the school hours. When I pointed out these concerns to one of my gatekeepers he told me "now you are finally one of us, you are paranoid and scared". When I looked at Spanish school books on literature with the methodology teacher, she showed me how they had removed her favorite Cuban author with a more patriotic one. However, these kinds of educational practices and strategies are common in any national schooling system, so they should not be exaggerated.

Finally the gap between the official ideology and home ideology endures. When I talked to some of the parents they told me that they still prefer to not talk about their political ideas or whether they question the regime's ideology to their kids. However, others do it but they warn their kids to be aware and never discuss this with others or at school. According to an informant this produces alienation because the discourse at home differs from the one they receive at school.

6.2 Reflections

In the methodology chapter I presented the limitations of my fieldwork. In the theory chapter I reflected upon the critical aspects of transition and global architecture of education. In these paragraphs, I will reflect on the limitations of the study, in particular the discussion chapter. In the first section of the discussion chapter I reviewed the features of the Cuban educational system and I contrasted it with GAE's features. Using the global architecture of education was necessary to understand if globalizing processes are also affecting the Cuban educational system. However, I found the GAE to be quite broad and, because of its multiple variables, difficult to operationalize through the discussion. It is possible that the theory is more suited to support the understanding of the complex network of global governance in education and its homogenizing effects rather than focusing on a specific case or country. The Cuban case, in addition, is constituted with ambiguities and contradictions, i.e. socialist ideology and neoliberal practice. Hence, it appears that any theory may be difficult to operationalize in the Cuban context.

For as much as I was inspired by the literature of Carnoy et al. (2007) and UNESCO (2005), when I was in Cuba, I felt that their studies had slightly idealized the Cuban case. Highlighting educational experiences as the Cuban in the field of international and comparative education is fundamental as they may present relevant examples of educational strategies. However, the goals and means of education cannot only be represented by for example literacy and numeracy rates. Above all, according to Freire's (2000) perspective and critical thinking are the most important skills that should be acquired through education. Therefore, it is important to put focus on the educational systems that enables the students to question the official knowledge.

"To educate is to free" is a quote from the Cuban poet and hero José Martí. Despite Cuba's free and equal approach to schooling, it offers a compartmentalized and uncritical knowledge, which does not free anyone. Educational agencies worldwide are also concerned about giving a school certificate to their students in order to prove that their skills qualify them for the labor-market. Which being part of is undoubtedly fundamental. However, the educational agencies should also be concerned about the students' skills of critical thinking, in order to not be oppressed by the labor-market economy.

If I was to do further research in Cuba I would study how the exposure to ICT could influence the performance of new generations in Cuba. From my data it is already possible to see that new generations are influenced by the new technology, however my research does not focus on how ICT may impact their performance. Further, could the exposure of the internet be able to compensate for the absence of alternative discourses in Cuba? Or will internet just be another instrument to spread homogenization?

7.0 References

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Appendices

Interview guides

The teacher

Section A- Personal

Can you tell me a little bit about yourself as a teacher?

What is your education?

When did you start working? Where have you been working?

What are your responsibilities?

How many subjects do you teach? What subjects?

What is the local culture of the pupils? Is it diverse?

How do you use their local culture as a resource?

Why do you think Cuban students score so high in standardized test? (see Unesco 2005, SERCE 2008)

Are recent test results as high as previously?

Section B- Economy

What changes in education do you expect in the coming years as a consequence of changes in the Cuban society?

To what extent if at all has the recent economic changes affected the students in class (motivation, ambitions, attention)?

To what extent is tourism affecting the students and schools?

To what extent has tourism affected parents' value of education?

Do students talk about internet? Do they use internet? Is it good or bad for the teaching? Does it add relevant information or is it just distracting for kids?

Section C – Social

Normally there are differences in terms of school achievement between students in class, which factors can explain these differences?

How does it impact on the pupils?

What do you know about the family background and socio-economic status of your students?

How would you describe the community/neighborhood in which the school is located?

How often do you talk with the parents of the kids?

How do you include children with special needs and learning disabilities in your class activities?

How do you include children from minority groups in your class activities?

Do you encourage students to have different views in history or politics?

How do you approach students who have different opinion?

Do parents/community respect the role of the teacher? (How?)

The principal

Section A- Personal

Can you tell me a little bit about yourself as a school director?

What is your education?

How long have you had this position?

Have you ever taught? What can you tell me about your teacher experience?

Current responsibility

What is your role as a principal?

Is there any communication between you and the teachers? What are the communication about, for instance do you have regular meetings?

Why do you think Cuban students score so high in standardized tests? (see Unesco 2005, SERCE 2008)

If parents are dissatisfied with school teacher's methods etc. what does the school do?

Section B - Economy

What changes in education do you expect in the coming years as a consequence of changes in the Cuban society? Changes in the curriculum? In the school relevance?

To what extent if at all has the recent economic changes affected the students in class (motivation, ambitions, attention)?

To what extent is tourism affecting the students and schools?

To what extent has tourism affected parents' value of education?

Do students talk about internet? Do they use internet? Is it good or bad for the teaching? Does it add relevant information or is it just distracting for kids?

Section C– Social

Normally there are differences in terms of school achievement between students in class, which factors can explain these differences?

Do you know the family background and socio-economic status of the students and do you keep data about it?

How would you describe the community/neighborhood in which the school is located?

Have families with difficult social economic background increased/decreased? Why?

Do students with disadvantaged background get help? What kind?

Is drop out a problem in the school? What are the reasons?

What does Cuban school do about it?

How does the school treat students who disagree with political situation in Cuba?

