

“ORDER, DISCIPLINE AND EXIGENCY”¹: CUBA’S VI PARTY CONGRESS, THE LINEAMIENTOS (GUIDELINES) AND STRUCTURAL CHANGE IN EDUCATION, SPORT AND CULTURE?

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By 2010, it had become clear to most significant actors within and outside of Cuba, that the current system of state organization, and in particular the economic model at the heart of half a century of a particular form of implementation of Revolutionary ideology, was not working. “Former Cuban leader Fidel Castro has revealed for the first time that he believes Cuba’s economic model does not work. Raúl Castro, the country’s president has made a similar blunt assessment a number of times before, but his revolutionary leader brother has never made such an admission.” (Now Comrade Castro admits Cuban economic system ‘doesn’t work’ 2010). Something had to be done. That “something” came in the form, first of a limited opening up of sole proprietorships and small farm holding for Cubans. (Backer Sept. 24, 2010). It has culminated in one of the most public projects of change since the triumph of the 1959 Revolution, the *Lineamientos de la política económica y social del partido y la Revolución*. (Partido Comunista de Cuba April 18, 2011) (“Lineamientos”).

The Lineamientos or Guidelines were developed over a long period and were widely distributed for public comment in the autumn of 2010. Indeed, the Cuban state apparatus and media made much of the democratic consultation undertaken prior to the consideration of the Guidelines by the Party. “Como resulta-

do del trabajo de la Comisión de Política Económica del VI Congreso del Partido Comunista de Cuba, se elaboró el Proyecto de Lineamientos de la Política Económica y Social que será discutido con toda la militancia, los trabajadores y la población en general para recoger y tener en cuenta sus opiniones y posteriormente será sometido a la aprobación del VI Congreso.” (Cubadebate November 9, 2010).

The Cuban State distributed the draft Lineamientos widely outside of Cuba as well. Highly placed Cuban academics and others were permitted to attend events outside of Cuba to explain the Lineamientos and generate discussion. Indeed, on the eve of the VI Party Congress, highly placed economists attended a conference in New York to discuss the Lineamientos and their potential impacts. (City University of New York April 2011). These included economists from the University of Havana’s prestigious Centro de Estudios de la Economía Cubana (Piñeiro Harnecker 2011; Vidal Alejandro 2011; Nova González 2011; and Pérez Villanueva 2011).

The transparency and national consultation culminated in the consideration of the Lineamientos, and their unanimous approval, at the long postponed VI Party Congress of the Communist Party of Cuba—the party in power in the Cuban state. The Party

1. From Raúl Castro’s Closing address to the VI Party Congress, April 2011. (Raúl Castro Ruz April 19, 2011)

Congress was a well-staged event, planned to coincide with the 50th anniversary of the failed Bay of Pigs Invasion, as Raúl Castro noted in his speech closing the meeting:

Considero que la forma más digna y a la vez productiva de conmemorar el 50º Aniversario de la Victoria sobre la invasión mercenaria en Playa Girón, un día como hoy, el 19 de abril de 1961, es precisamente haber efectuado un magnífico Congreso del Partido, reunión que culmina tras algo más de cinco meses del inicio de las discusiones acerca de los Lineamientos, proceso de profundo carácter democrático y transparente, cuyo protagonismo indiscutible lo asumió el pueblo bajo la dirección del Partido. (Raúl Castro Ruz, April 19, 2011, at 2).²

As approved by the VI Party Congress, the Lineamientos consist of 313 Sections. They provide suggestions for action that affects nearly every aspect of Cuban economic life, with consequential effects on social, cultural, educational and other sectors of activity that had been under the direction of the State. A companion booklet was also published: VI Congreso del Partido Comunista de Cuba, Información sobre el resultado del debate de los Lineamientos de la Política Económica y Social del Partido y la Revolución (Mayo de 2011) (Partido Comunista de Cuba May 2011) (the “Tabloide”). The Tabloide presents a summary of the changes from the draft Lineamientos and the official reasons for the changes. Both are required reading for getting a sense of extent and direction of the economic (and necessarily political) changes that are being contemplated in Cuba.

The Lineamientos serve as a detailed, though still general, basis for reordering the economic framework within which Cuban socialism is understood and ultimately applied to the construction of government, society and economy. They suggest the opening to potentially significant structural changes in Cuban

economic policy. Archibald Ritter rightly notes that the Lineamientos are both necessary, given the impossible economic condition of Cuba, and also represent an effort to create a legacy for the Cuban Revolution that can survive the Castro brothers. “The ‘Lineamientos’ represent an attempt by President Raúl Castro to forge his own ‘legacy’ and to emerge from the long shadow of his brother, as well as to set the Cuban economy on a new course. The ratification of the reform agenda represents a successful launch of the ‘legacy’ project.” (Ritter June 17, 2011). He concludes, however, that “President Raúl Castro would indeed make a unique and valuable contribution to Cuba and its citizens were he to move Cuba definitively through dialogue and agreement among all Cubans towards a model that guarantees both economic and social rights as well as civil liberties and authentic democracy.” (Id.).

One of the most unusual things about the Lineamientos is the low expectations that surrounded their approval. There was a grim sense among the leadership that the revolutionary potential of the Lineamientos might well be hostage to the Revolution itself. Raúl Castro captured the mood of the leadership well:

no nos hacíamos ilusiones de que los Lineamientos y las medidas a ellos asociadas, por sí solos, fueran la solución a todos los problemas existentes. Para alcanzar el éxito en esta cuestión estratégica y en las demás, es preciso que de inmediato nos concentremos en hacer cumplir los acuerdos de este Congreso, bajo un denominador común en nuestra conducta: el ORDEN, la DISCIPLINA y la EXIGENCIA. (Raúl Castro Ruz April 19, 2011).³

Indeed, the expression “Order, Discipline and Exigency” best captures the tone and mood of the current Cuban Communist Party line that is at the center of this new effort to remake Cuba without

2. Translation: “I believe that the most worthy, yet productive, manner to commemorate the 50th Anniversary of Victory over the mercenary invasion at Playa Girón, a day like today, April 19, 1961, is precisely to have convened a great Party Congress, a meeting that serves as the culmination of more than five months from the start of discussions on the Guidelines, a process of profound democratic and transparent nature, in which the people, under the leadership of the Party, indisputably played a role.”

3. Translation: “we have no illusions that the Lineamientos and its associated measures, by themselves, are the solutions to all of our problems. To succeed in those strategic endeavors as well as in others facing us, we must immediately concentrate our efforts on implementing the agreements approved by this Congress under a common denominator of conduct: ORDER, DISCIPLINE and EXIGENCY.”

betraying the fundamental normative structures on which the 1959 Revolution is based.

Moreover, the scope and effect of the Guidelines remain highly contested. (Backer May 17, 2011). While the West greeted these changes as an opening to even greater economic (and ultimately political) changes (Lyman 2011), those closest to the centers of Party and State power suggested a much more conservative vision of the place of the Lineamientos. (Guerra 2011). Raúl Castro emphasized both the limited nature of the reforms (despite their comprehensive scope) and the speed with which they will be implemented. “Raúl Castro Closed the Congress of the Communist Party of Cuba. The First Secretary of the Central Committee of the Communist Party of Cuba (CPC) Raúl Castro said the . . . main enemy is in our own shortcomings and therefore, in such a great task to the future of the country we will make needed changes if necessary as indicated by Fidel and at the pace demanded by the circumstances.” (Embassy of the Republic of Cuba in the Kingdom of Denmark 2011).

Lastly, one can expect that Party Rightists, like those in China during the course of the reforms of the late 1970s-1980s, will play a significant spoiler role. And it is not clear how and in what direction Fidel Castro himself will seek to influence the shape and application of these reforms. Raúl Castro put a positive spin on his brother’s approval of the work of the VI Party Congress. “No renunciaremos a hacer los cambios que hagan falta, como nos indicó Fidel en su reflexión de ayer, los que efectuaremos al ritmo que demanden las circunstancias objetivas y siempre con el

apoyo y comprensión de la ciudadanía, sin poner nunca en riesgo nuestra arma más poderosa, la unidad de la nación en torno a la Revolución y sus programas.” (Raúl Castro Ruz April 19, 2011).

But it remains far from clear the extent to which Fidel Castro will support the actual efforts to implement the Guidelines, at least to the extent they substantially undo his own vision of state organization. Fidel Castro’s last words to the Party Congress in this respect are emblematic. Speaking of the members of the VI Party Congress, Fidel Castro noted:

Por ello, persistir en los principios revolucionarios es, a mi juicio, el principal legado que podemos dejarle. No hay margen para el error en este instante de la historia humana. Nadie debe desconocer esa realidad. . . . La nueva generación está llamada a rectificar y cambiar sin vacilación todo lo que debe ser rectificado y cambiado, y seguir demostrando que el socialismo es también el arte de realizar lo imposible: construir y llevar a cabo la Revolución de los humildes, por los humildes y para los humildes, y defenderla durante medio siglo de la más poderosa potencia que jamás existió. (Fidel Castro Ruz April 17, 2011).⁴

While the Party developed and approved the Lineamientos, the State apparatus is charged with its implementation. (Partido Comunista de Cuba April 18, 2011, Implementación de los Lineamientos). The Guidelines will be implemented slowly over the next five years by a commission to be created by the government. (Id.).⁵ “Al Partido Comunista de Cuba corresponde la responsabilidad de controlar, impulsar y exigir el cumplimiento de los Lineamientos aprobados por el VI Congreso del PCC en cualquier lugar que actúe.”⁶ (Id.). In addition, one can expect a num-

4. Translation: “Therefore to uphold revolutionary principles is in my view, the main legacy we can leave you. There is no margin for error in this moment of human history. No one should ignore that reality. . . . The new generation is called upon to rectify and change without hesitation all that must be corrected and changed, and continue to demonstrate that socialism is also the art of the impossible: to construct and carry out the revolution of the humble by the humble and for the humble, and defend it for half a century from the most powerful country that ever existed.”

5. The Guidelines provide that the Commission is to work in four general directions: “1. Organizar, orientar y controlar el proceso de implementación de los Lineamientos. 2. Organizar y controlar la preparación de los cuadros y demás categorías de personal que dirigirá o ejecutará la referida implementación. 3. Orientar el proceso de control que cada organismo o entidad debe ejercer sobre las medidas que se vayan adoptando para implementar los Lineamientos y sus resultados. 4. Conducir la divulgación adecuada del proceso.” (Partido Comunista de Cuba April 18, 2011, Implementación de los Lineamientos).

6. “To the Communist Party of Cuba is entrusted the responsibility to control, encourage and require compliance with the Guidelines approved by the VI Congress of the PCC wherever the Party has a role to play.” Id.

ber of informal efforts at implementation, as well as some dissonance between the rate of progress in key cities and in the more outlying areas of the nation. These insights have not been deep in the background of proceedings. They have served as the keynote of Raúl Castro's closing speech to the VI Congress and they are inherent in the analysis of Cuban academics (Pérez Villanueva 2011).

Though the focus of attention has been on the economic changes proposed in the Guidelines, few aspects of Cuban social, cultural and political life have been left untouched. Among the provisions found in the Guidelines are a small number that focus on what are called issues of Social Policy (Política Social). These target the great cultural-political achievements of the Revolution—medical care, education, culture, sport, social security, employment policy and state subsidies. The importance of these sectors cannot be underestimated both in the internal and external relations of the state and Party. At least since 1994, the Cuban government and the Party have stressed “the safeguarding of education and health as the basic accomplishments of the revolution.” (Lutjens 1996, 5).

This essay examines the way in which the Lineamientos seek to bring change to the core of Cuban Revolutionary achievement, in the area grouped under the title Social Policy (Política Social)—education, medical care, culture, and sport. It focuses specifically on the Política Social provisions of the Lineamientos relating to education, sport and culture. To a significant extent, these serve as an important part of the ideological heart of the Revolution, as well as a barometer of changes in the fundamental direction and application of the Party line and its effectuation. The treatment of these areas of Revolutionary achievement in the Lineamientos can suggest the extent and character of the fundamental changes that are being attempted and the extent to which these changes represent movement away from the core principles of the Revolution.

The essay starts with a description of the Lineamientos provisions touching on issues of Política Social as they relate to education, with a secondary look at the related provisions affecting health, sport and culture. It will consider these Guidelines in light of

those initially proposed and explore the extent of the changes within the framework of the Lineamientos as a whole. The second part of the essay will focus on analysis. The education provisions are less about the mechanics of education as they are an acknowledgment of education in the service of a state in which a smaller number of young must support a larger number of pensioners. (Gonzalez & McCarthy 2004, 71–78). “In sum, although Cuba's changing demographic structure would appear to indicate that resources should be shifted from the youth to the aged, such a policy would appear to be short-sighted: Since the country's future economic growth will hinge more on the quality than on the quantity of its labor force, emphasis would be better placed on improving labor's productivity. This emphasis, in turn, will require not only an increased investment in educating and training current and future workers but also a major reorganization of Cuba's educational system.” (Id., at 78). It will suggest what the changes may mean for the future course of the development of Cuban state-Party ideology. It will examine some current criticisms of the current state of Cuban education. It will also discuss the ways that the fundamental assumptions underlying the Lineamientos regarding economic activity may drive the reorganization and provision of education, sport and culture in the coming years and their consequences for the development of Cuban socialism.

THE LINEAMIENTOS

General Provisions

The five sections that make up the general provisions serve both to acknowledge the continuing importance of education, health, culture and sport as a central element of state policy and the need to change the way in which these services are delivered. Yet it also suggests that these central policies must be bent to the economic realities, and economic transformations, that will affect the rest of the organization of economic life in Cuba. The rearrangement of the role of education, culture, sport, and the like in the service of labor and the creation of the revolutionary citizen is at the heart of the changes brought about by the Lineamientos.

Section 140 (originally Section 129 of the Draft Lineamientos) provides the ideological foundation for what follows as well as an interpretive framework. But it is a defensive rather than a forward-looking framework. The object is not to advance but to *preserve* the victories. The Guidelines must serve to continue to preserve the accomplishments of the Revolution—access to medical care, education, culture, sport, recreation, social security and aid to those in need. Significantly, the original provision was changed to add social tranquility (“tranquilidad ciudadana”) to the list of accomplishments to be preserved. (Tabloide, 24) It is possible that this is a framework reference to the Chinese Party Line—Harmonious Society—that emphasizes the primacy of the collective good and social stability as a privileged value. (Communist Party of China, Consulate General of the PRC 2006, “The plenum pointed out that social harmony is one of the targets that the CPC will make unremitting efforts to hit. . . . Since the 16th CPC National Congress, with deepening understanding of social harmony, the CPC has made clear the status of building a harmonious socialist society in the overall plan of the socialist cause with Chinese characteristics and made a series of decisions and deployments to strive for new achievements in the building of a harmonious society.”). For the Cuban State and Party apparatus, notions of harmonious society, with Cuban characteristics, can serve as an ideological framework for resisting movements to broaden the base of political power from the CCP.

Section 141 turns from the fundamental position of the Party and the functional framework within which changes are to be considered, to the pivotal role of work for the economic well being of society (recall the fundamental importance of harmonious society in Section 140) and its role in meeting personal and family needs. Section 141 was amended by the VI Party Congress to add a reference to the income derived from work as the fundamental means of satisfying personal and family needs. (Tabloide at 24). Section 142 calls for a guarantee of the sustained and systematic elevation of the quality of services offered to the public by redesigning existing policies, subject to the availability of resources for this purpose. (Id.). Section 142 makes clear, beyond its hortatory lan-

guage, that the State will live within its economic means in offering services and that, if those means shrink, the level of services may have to shrink as well.

Lastly, Sections 143 and 144, originally limited to culture and social security, respectively, were generalized and made part of the normative framework for the entire section covering education, culture, sport, health care, and social security. Section 143 focuses more specifically on the particular fields to which these general provisions apply—education, public health, culture and sport. Within the constraints of the general framework provisions of Sections 140–142, these particular endeavors are to be improved. (Tabloide, 24). But improvement will now be measured against economic efficiency; Section 143 also emphasizes the essential need to reduce or eliminate excessive costs in the social sphere. (Id.). This suggests two important changes. First, the way that success in the social sphere—even in the core areas of education, sport, culture and the like are measured—will change from one based solely on output regardless of cost, to one in which cost will be a factor and the relationship between cost and benefit will become relevant. Second, the term excessive cost (“gastos excesivos”) remains undefined. The actual development of the meaning of this term will determine the scope of changes to the fundamental way in which investment in these areas is reconceptualized. In addition, the VI Party Congress added a significant requirement that can serve as an opening for transformative change: it added to Section 143 the idea that education, sport, culture and public health programs will have to find positive means of revenue generation, leading at least to supplementation of their operation costs and ultimately suggesting the possibility of self sufficiency through fees and other revenue generating programs. The revenue generating criteria had originally been only part of the Guidelines for culture and appeared as Section 152 of the draft Lineamientos; the VI Party Congress moved it to the general provisions. Thus, in reshaping education, sport, culture and public health, the VI Party Congress added two substantial basic changes with potentially profound effect—the first is a sensitivity

to the value added of costs, and an emphasis on the need to generate revenue.

Section 144 was originally only applicable to issues of changes in social security. It confronts the issue of the aging population of the Nation. Though a developing state, Cuba has the demographic profile of an advanced developed state, with an expanding population of aged citizens supported by a shrinking population of working age individuals. (Más 2011). Section 144 requires the State to pay particular attention to the study and implementation of strategies in all sectors of society to address the issues of population aging. Interestingly, the focus on aging does not include provisions to make the aged more socially useful—for example by using the aged for training or as a source of knowledge. The state position on aging has not undergone much change between the 1980s and 2008, when the State began to cut back benefits for the elderly. (Bertera 2003; Cuba to Raise Retirement Age by Five Years 2008). Yet such a need for change is implicit in the Lineamientos targeting education.

Taken together, Sections 140–143 provide a blueprint grounded in contradiction, with ample room to choose among the various factors listed. It starts with a determination to preserve the gains of the Revolution that have served as the means by which the Revolution's success is measured, but then it bows to the realities of the economic situation that has brought the Party to this reevaluation of its values. That reevaluation now emphasizes labor—and the remuneration from individual labor, as the foundation on which the new economic order is to be built and societal welfare advanced. The Guidelines guarantee changes to the system by which services are provided, but limit those promised changes to those possible under existing economic circumstances. It promises the per-

fection of the key areas of Revolutionary success but insists that such success be measured in a new way and that, in effect, the proof of success be measured by revenue generation. All of this is to be accomplished under the threat that increasing resources will have to be devoted to the maintenance of an aging population by a smaller percentage of working age individuals.

Education

Education is free in Cuba to students. (Gasperini 2000, 5). It is highly organized. Education has two objectives—the first is traditional and substantive, focused on the teaching of skills and the development of knowledge sufficient to provide an individual with the skills necessary to contribute to society. The second, and equally important objective, is to politically train the individual.⁷ (e.g., Alarcón 2011). This is not unusual. Indeed, in 1930, Karl Llewellyn famously described the common understanding of the relationship of education, order and civilization in the context of describing the role of legal education in the United States.⁸ The difficulty for the Cuban state has been what is now perceived to be an imbalance between the political and economic ends of education and the means of righting that balance in an age of extreme austerity and educational fluidity.

Since the 1959 Revolution, the government has devoted substantial resources to the development and centralization of education.⁹ “Centralized control of education has been both a necessity and a choice in post revolutionary Cuba. Education in socialist Cuba has been considered a human need and a basic right, and schools have been a consistent priority within changing economic strategies.” (Lutjens 1996, 69). The national education system is highly bureaucratized. Since the 1980s, the national education system has been divided into seven sub-systems: preschool

7. “El objetivo era ‘crear un hombre nuevo’ mediante la combinación del estudio con el duro trabajo agrícola.” (Espinosa Chepe 2011a).

8. “The basic order grows, I repeat, not from law, but (at least every generation) from the process of education.” Karl N. Llewellyn, *The Bramble Bush: The Classic Lectures on the Law and Law School* 118 (2nd ed., New York: Oxford University Press, 2008) (1930).

9. “Desde el 1ro de enero de 1959, las transformaciones en el sistema educacional son evidentes: primero con una campaña de alfabetización que redujo el nivel de analfabetismo a un tres por ciento, luego las metas para elevar el nivel educacional a más de un sexto o noveno grado, luego exhortar a alcanzar un duodécimo o superior.” (Fidel Castro Ruz July 6, 2011).

education, general polytechnic and career education, special education, technical and professional education, faculty training and upgrading, adult education, and higher education. (Hernández Pérez 2005, 213).

It is of equal importance to note the high quality of education Cuba has historically provided, free of charge, to its citizens. As a consequence of the substantial focus and attention given to education in the years following the 1959 revolution, education in Cuba has become among the highest ranked in Latin America, Cuban students often outscore their non-Cuban counterparts by two standard deviations. (Gasperini 2000, 5, 6). In addition to comparatively generous funding, Cuba's educational system has benefited from the long-term planning and stability characteristic of single party control by the PCC. (Id.). That is, because curriculum and materials are developed and provided by the state, the state is able to not only further the "holistic development of the new human being" (Id.) in line with the social goals of the nation state, but is also able to ensure that a high value is given to the relation between work and study. Furthermore, the Cuban education system has placed a high value on technical, vocational, and polytechnical education. In relating work and study, Cuban education has sought to integrate labor by the use of school gardens in primary schools, woodshop for boys and sewing for girls in secondary school, and technical vocational training for 50% of students reaching 9th grade. For these older students, and again in even higher education, curriculum is developed by the public sector's employment organizations and ministers of the various departments that will one day employ this next generation. That is, although the Ministry of higher education is responsible for higher education generally, the administration of particular institutions is subordinated to ministries of employers of the institutions grads. For example, the ministry of public health is responsible for over-

seeing the institute of medical science. (Hernández Pérez 2005).

The Lineamientos do not seek to reorganize education, or to change its central place in Cuban policy. Instead, they seek to work at the margins, effectively turning education into a more directly effective tool of economic activity and less as a social tool for creating the revolutionary citizen, but one that is sensitive to cost and able, to generate revenue. For that reason, perhaps they have won some praise even among people inside Cuba who are known to be critical of the status quo. (Espinosa Chepe 2011a).¹⁰

The education Guidelines apply to all aspects of education. The original references to pre-school, primary and middle school education were dropped. (Tabloide, 24). Section 145 of the Guidelines sets out the basic parameters. It underwent substantial revision and was the object of more than 13,000 comments. (Tabloide, 24). Originally, Section 145 stressed the need for further progress in raising the quality and content of education; this was to be accomplished in part by making better use of existing resources, reorganizing the delivery of education centers by providing for mixed or joint education centers, and resizing existing schools to better utilize the teaching labor force. (Tabloide 24). The VI Party Congress changed the focus of the provision in some respect. As finalized, Section 145 provides for further progress in raising the progress and content of education, and the better use of the workforce and physical capacities, moving issues of mixed-use centers to Section 148. (Tabloide, 24). But the provision now focuses more attention on teachers rather than on buildings. It identifies the teaching staff as an area fit for improvement, both in terms of their improvement ("jerarquizar la superación permanente") and of their status in society ("enaltecimiento"). More importantly, and in what might mark a significant shift in emphasis, the VI Party Congress added a provision rec-

10. Espinosa Chepe writes: "In approved items 145 to 153, those applicable to education, the old and adverse educational policies of schools in the country are abandoned, as well as the training of emerging and integral teachers, the discredit of the training of technicians and qualified workers and the excessive priority given to humanities taught with a high degree of ideologies, a practice that is still in effect. Unfortunately, the significant damages caused to the education and health systems, where great advances were obtained, will take time to repair, especially with the lack of economic sustainability that prevents the allocation of the significant resources that are needed to recover the normal operation of these important services." Id., at 4.

ognizing the role of the family in the education of its children. (Id.). At its broadest, this suggests a willingness on the part of the State to loosen its control over the education of the young, a task that has in the past been deemed to be critical for the formation of ideologically well trained cadres and necessary for the formation of appropriate socialist sensibilities essential to the dissemination and naturalization of socialism within Cuban society. (Gasperini 2000). This provision either suggests the confidence of the State that its half century project in the formation of political culture has now become deeply enough rooted that families will pass on appropriate values to their children, or that such a task is beyond the state and a retrenchment in light of this insight is necessary. At its broadest, it suggests the possibility of the re-entry of institutions like the Catholic Church in the provision of education (in whole or in part); at its narrowest, it suggests an official imprimatur of recent efforts to use radio and television to delegate state based instruction to parents (for example through the “*educa a tu hijo*” programs on Radio Rebelde).¹¹

The focus on teacher quality is also a significant part of Section 146. Abandoning the focus on a territorial basis for improvement of faculty in the draft Lineamientos, the VI Party Congress changed the provision to include a requirement to better train teachers to meet the needs of schools at all levels of instruction. (Tabloide, 24). The implications are obvious. Two provisions with a focus on teacher quality suggest that Cuba, like other developed states, have now found that teacher training is not producing the sort of personnel necessary to impart the knowledge and training now required of its students. Putting this together with Section 140, there is the suggestion that

the preservation of the accomplishments of the Revolution now require a greater and different focus on teacher training. This hint of changes in the effectiveness of Cuban education is further refined by the intimations of Section 147, which speak to the need to strengthen the role of professors in their classes (“*Fortalecer el papel del profesor frente al alumno*” Tabloide, 24). But Section 147 also acknowledges the way in which Cuban education has been falling behind in terms of its ability to use innovative (and expensive) technology in the classroom. Section 147 thus speaks to the need to obtain equipment and audiovisual media as a complement to teaching, as well as the need to ensure that such equipment and media are rationally used (“*garantizar el uso racional de los mismos*” Tabloide, 24). Rational use is not defined. But applying the framework provisions of Sections 140–144, it is likely to include tight control over content derived from the Internet and the need to use the materials to augment fidelity to the political system. It also suggests that such equipment would have to be cost effective, and might serve as a basis for the generation of additional revenue.

Cost plays heavily into Sections 148 and 149, which will significantly and adversely affect the quality of special education for Cuban youth. It provides for the gradual reorganization of the primary and secondary special school systems (middle and high schools), the *Escuelas de Red Escolar*,¹² for the purpose of lowering costs to a minimum by reducing the number of internal students and the provision of transportation and meal costs. This provision represents a retrenchment of the provision of special education that severely tests the ability of the State to meet its requirements and remain true to the require-

11. In a 2008 interview on Radio Rebelde, then vice minister Irene Ribera Fereiro was quoted as follows: “La viceministra afirmó que el programa ‘Educa a tu hijo’ constituye una modalidad de estudios para los infantes en esas edades con iguales propósitos que los de los círculos infantiles. No se trata de una alternativa o paleativo para suplir la carencia siempre creciente de la matrícula en los círculos infantiles—afirmó categóricamente.” (Valenzuela 2008).

12. “El modelo de escuela especial en nuestro país parte de su ubicación dentro de la red escolar del Ministerio de Educación y se proyecta hacia todo el sistema nacional de educación. Se trata, en todos los casos de escuelas estatales, de un alto reconocimiento social y prioridad en su atención, que aseguran el acceso y gratuidad para todos.” (Núñez García-Sauco 2004). By 2008, it was reported by the organs of the State that “Nowadays, there are more than 5,000 people with disabilities studying in higher education in Cuba, said MORAÍMA OROZCO, director of Special Education of the Ministry of Education. . . . In Cuba, there are 403 special education schools, each enjoying a high state priority and great social recognition. These schools and micro-universities are used to train special education teachers.” (Hernández Serrano 2008).

ments of Section 140. Section 149 carries the theme further. It seeks to adjust the capacity of the Red Escolar, and teachers in primary education, in line with economic and socio demographic factors, and with consideration to the residence of students. (Tabloide, 24–25).

With Section 150, the Lineamientos suggest a greater focus on education in the service of the economic needs of the state. No longer a principal vehicle for the instruction of students in the ideological system of the state, education is now more focused on the training of economically useful citizens, especially in those positions that the State has now set aside for private sector activity. This section started simply enough in draft form, specifying that enrollment in different courses will be in keeping with the demands of the development of the economy and society.¹³ The VI Party Congress made extensive changes in light of the framework provisions adopted for the section on Política Social. As modified, Section 150 was transformed from a fairly innocuous provision to something somewhat more powerful. It now imposes an obligation to ensure that enrollment in different fields of study (“matrículas en las diferentes especialidades y carreras”) correspond to the demands of the development of the economy and society. Incorporating the family obligation values of Section 145 and the need to make education more useful in draft Section 140, Section 150 also provides that the state is to ensure that that vocational training and guidance for professional careers which are implemented from a student’s primary education, in conjunction with production and services agencies, and with the participation of the family, enhance the recognition of the work of mid-level technicians and skilled workers. There is thus the attempt at a seamless web—from state control of the direction of economic activity, to the role of the family in the education of workers, to the reorientation of education to focus on training for useful work, to the development of “value-added” education in which education services (as well as sport and culture) can start to pay for

themselves, to the retraining of teachers. Cuban education is to be made to judge its success not just by the production of doctors and other elite professionals, but also by the production of technical and service personnel to fill traditional craft and service jobs.

The goals of education reform cannot, however, be reached without attention to success in the output of students who will fill necessary positions in the public and private sector. Section 151, then, focuses on the goal of increasing the rigor and effectiveness of the educational process to increase the efficiency of the school year (percentage of graduates enrolled compared to the beginning of the cycle). Lineamiento 151 also speaks to an outputs-based assessment system—percentage of graduates—that mirrors the turn in U.S. educational policy, moving from input to output measurements. (Dowling 2008).

Just as Section 150 included a renewed focus on vocational training, Section 152 focuses on a reorientation of university education, at least to some extent. It provides for an updating of the training and research programs of universities according to the needs of economic and social development of the country and new technologies, and increased enrollment in agricultural careers, educational, technological and related basic sciences. The VI Party Congress changed the original draft to incorporate the need for closer links with the productive sector, including an increase in the enrollment in agricultural and education careers. (Tabloide, 25). Both reflect policy priorities. The need for additional teachers is also central to the teacher training provisions of the Lineamientos. The university education provisions are quite significant. They represent an acknowledgement of the imbalance between the political objectives of education, deeply embedded in the ideology of State and Party, and the need to better balance those objectives with the economic needs of the state. But Lineamiento 152, ironically, mirrors an issue facing higher education in the United States as well—figuring out first how to determine what courses of education are most needed and then convincing students that it is in

13. “La matrícula en las diferentes carreras estará en correspondencia con las demandas del desarrollo de la economía y la sociedad.” (Lineamientos Section 150).

their best interest to undertake courses of study in those fields. In the United States, university resources are spent trying to get a sense of the value of particular courses of study—polling employers, seeking data generated from public and private sources, and paying special attention to recruitment trends. Substantial efforts are expended in managing student opinion founded on the belief that all students will seek to maximize the value of the earning that could be produced from their education. It is not clear that the Cuban state apparatus will be able to quickly develop this sort of facility, and manage student demand effectively.

Lastly, efficiency and cost-cutting are at the core of Section 153 of the Lineamientos. This Section significantly limits state support of worker retraining. It effectively provides that worker retraining is to be accomplished during non-working hours and at the employee's expense. The need for workers to remain productive now appears to increase incentives to keep workers at their jobs. This need now supercedes the need to retrain workers. Workers who seek retraining or skills improvements will have to do so on their own time—after work—and the state will no longer pay for these efforts. The only exception is for what is described as cases of special state interest (“los casos de especial interés estatal”). (Tabloide, 25). These special circumstances are not defined, but they do provide a bit of flexibility for the state in providing subsidies for worker retraining. This is most likely to apply in the case of workers in state industries and other workers that may be of use to the state—for example workers involved in labor-for-products barter transactions. (Backer 2011).

Sport

“The body responsible today for the organization of sport in Cuba is the *Instituto Nacional de Deportes*,

Educación Física y Recreación (INDER), which was established in February 1961, 2 years after Castro's military victory. INDER built upon the work begun by the Ministry of Education, Army, and General Sports Council. In effect, INDER became the ministry of sport and was bound up with central government and reflected its views” (Chappell 2004). Sport is deeply bound up in the education of the population and in the development of national pride and cohesion. The Lineamientos continue to make explicit the connection between sports and education and the appropriate development of the socialist citizen. The Tabloide provides that priority will be given to the development and promotion of sports and physical culture as a means for education and the integral development of citizens.¹⁴

The Lineamientos include two sections dealing with sport. The first, Section 161, includes the introductory declaration of the priority of sport for the development of citizens and as an integral part of education. The VI Party Congress was well aware of the importance of sport for the quality of life of Cuban citizens. (Tabloide, 26). For this purpose, Section 161 was broadened to provide for more than that the principal focus of efforts should target the mass practice of physical activity and physical fitness as an object of the anticipated reorganization of the system of managing sports and the restructuring of its network of centers. (Tabloide, 26).¹⁵ The VI Party Congress added a focus of sport, in all of its manifestations, as a means to improve the quality of life, the education and the development of citizens. At the same time, Section 162 continues the emphasis on producing internationally competitive athletes.¹⁶ The emphasis here is on the maintenance of rigor in training programs. (Tabloide, 26). “Con relación a la contratación en el extranjero de los deportistas y docentes, se recibieron propuestas diversas sobre su inclusión o no

14. The title to the section of the Lineamientos for the Section including the provisions dealing with Sports provides “Será prioridad el fomento y promoción de la cultura física y el deporte en todas sus manifestaciones, como medios de educación y formación integral de los ciudadanos.”

15. “... para ello concentrar la atención principal en la práctica masiva del deporte y la actividad física, a partir del reordenamiento del sistema deportivo y la reestructuración de su red de centros.”

16. “Elevar la calidad y el rigor en la formación de atletas y docentes, así como en la organización y participación en eventos y competencias nacionales e internacionales, con racionalidad en los gastos.”

en el Lineamiento. Es un tema que se continuará estudiando.” (Tabloide, 26).¹⁷ Of course, the issue of foreign recruitment of star athletes, especially by U.S. professional sports teams, has been a continual source of irritation to the Cuba state. (Castro criticizes Cuban baseball player defectors 2005; “President Fidel Castro criticized Cuban baseball players who have left the country for multimillion-dollar contracts in the major leagues, saying the island always finds better players to replace them.”). As in many of the education Guidelines, the emphasis appears to be on added rigor to programs, but also the need to conserve resources and reorganize to save costs.

Culture

Culture provides the last aspect of the Cuban educational project. Through culture and cultural endeavors, the Cuban state is able to project its national character, both internally and externally. Culture, then, is an integral part of national identity, and the teaching of such an identity is essential to preserve the integrity of the state. Section 163 sets the tone. It is meant to provide guidance for the use of culture to enrich cultural life and to deploy community work associated with cultural endeavors as a means of satisfying the spiritual needs of the population as well as to strengthen social values. (Tabloide, 26 (fundamentación del cambio)).¹⁸ As originally written, what became Section 163 focused on the effective use of funds in the production of culture. But this emphasis was generalized and moved to Section 143. What remains is the direction to encourage actions that will preserve cultural activity as a means to protect national identity and the cultural heritage of the nation. The Guidelines also direct the state to continue to encourage artistic and literary production and the ability of the population to appreciate artistic production. (Lineamiento Section 163). Lastly Section 164 connects cultural production with education directly. It directs the state to continue to produce professional teachers of art and art appreciation. But the

production of arts teachers is to be managed to meet the needs of the provinces and representative groups. (Id.). The inefficiencies of teacher overproduction in non-essential categories is clearly reflected here.

The provisions of the Lineamientos touching on culture, like those focusing on education and sport, push the state in two directions. On the one hand, the guidelines require the state to pull back, reorganize and change its behavior in light of the realities of lack of resources. On the other hand, the guidelines also seek to preserve the quality of these programs, and even expand their reach and utility, but to do so with fewer resources. More importantly, the state is directed to privatize some of this activity—the family is now expected to pick up some of the responsibility for education. The character of these activities is expected to change as well—not merely a subsidized responsibility of the state, as representative of the people, education, sport and culture is meant to become more self-sustaining financially. In a sense the fundamentals have not changed, but beneath this sameness, everything has changed—from scope to implementation to character of the provision of services at the core of the success of the government to inculcate revolutionary ideas among the population.

The Cubans, of course, are not unique in this respect. Many jurisdictions in the United States, and to some extent, public education and the provision of culture in the United Kingdom, are facing the same dilemmas. Ironically they are also responding in a similar way, after years of increasing funding for education. Consider the recent statements of President Obama:

Think about it. Over the next 10 years, nearly half of all new jobs will require education that goes beyond a high school education. And yet, as many as a quarter of our students aren't even finishing high school. ... That responsibility begins not in our classrooms, but in our homes and communities. It's family that first instills the love of learning in a child. ... Our schools share this responsibility.

17. Translation: With regard to the overseas recruitment of athletes and teachers, there were various proposals on whether or not to include them in the Guidelines. It is an issue that will continue to be studied.

18. In the original: “Mejora la redacción e incluye la promoción de la lectura, el enriquecimiento de la vida cultural y el trabajo comunitario como vías para satisfacer las necesidades espirituales y el fortalecimiento de los valores sociales.”

When a child walks into a classroom, it should be a place of high expectations and high performance. But too many schools don't meet this test. That's why instead of just pouring money into a system that's not working, we launched a competition called Race to the Top. ... In South Korea, teachers are known as "nation builders." Here in America, it's time we treated the people who educate our children with the same level of respect. (Applause.) We want to reward good teachers and stop making excuses for bad ones. ... And over the next 10 years, with so many baby boomers retiring from our classrooms, we want to prepare 100,000 new teachers in the fields of science and technology and engineering and math. (Obama 2011).

The State of the Union speech by the American President sounds like it was taken from the core section of the education provisions of the Lineamientos. It follows that it is not necessarily the Marxist Leninist principles on which the Cuban State is founded that have produced a substantially unsustainable system of education, sport and culture. Free market states face similar if not graver problems. The issue appears to be global in scope—the difficulty of a commitment to public education in a context in which the popular pressure on States forces expenditures for other purposes. And like free market states, this move away from a privileging of education, sport and culture as a public obligation is compounded by the diminution of the social position of the key factor in the production of the three—teachers. Reading the Lineamientos it is sometimes not clear whether the document was produced in Havana for Cuba or in Harrisburg for Pennsylvania. But whether in Cuba or in Pennsylvania, it is clear that substantial changes to the public education system are in the offing, and that those changes are in part determined by changing requirements of economic and political policy, but perhaps in larger part determined by the unwillingness of the State to continue to privilege education, sport and culture at the expense of other objectives.

MOVING FORWARD

The Lineamientos in general, and their application to the areas of Política Social, suggest the contradictions of Cuba's efforts to transform its economic systems without changing its social systems. The idea is to re-

duce the role of the state in financing and to some extent delivering services but not its control over political, economic and cultural life. (Martínez Hernández 2010). The contradictions, and risks, represented by the Lineamientos are well understood by the Cuban elite. The Lineamientos create a stew in which the state continues to control the most important sectors of production and also retains a monopoly on operation in corporate form, the people are expected to engage in autonomous economic activity that is meant to generate wealth for themselves and the state (through tax revenues) and the Party is meant to provide guidance to both in equal measure. (Guerra 2011). Nothing changes in the fundamentals of the organization of the Cuban state, yet everything changes within the context of that unchanging normative framework. The Cuban leadership signaled the complexity and contradiction of the Lineamientos early in the process. "Cuban President Raúl Castro has ruled out large-scale market reforms to revive the communist island's struggling economy. But Mr. Castro said the role of the state would be reduced in some areas, with more workers allowed to be self-employed or to set up small businesses." (Raúl Castro: No Reform But Cuba Economy Control to Ease 2010).

This is no revolution, even judged by Chinese or Vietnamese standards. The focus is not on the aggregation of capital, or even of labor, for the production of goods or services. (Piñero Harnecker 2011). Rather, the focus of the changes is on the creation of a class of sole proprietor. Large-scale economic activity remains the sole province of the state. The state has been careful to limit the sorts of occupations or economic activities to which liberalization applies. (Martínez Hernández 2010). Liberalization occurs only at the lowest level of economic activity—that is on activity with respect to which aggregation of labor or capital is not required. (Id.).

Beyond these activities, and certainly with respect to activities that might be undertaken jointly with foreign capital, the state retains a monopoly.

Los medios fundamentales de producción continuarán como propiedad estatal de todo el pueblo pero se ampliará considerablemente el campo a las formas de propiedad o gestión no estatales en numerosas

producciones y servicios mediante un gran impulso al autoempleo y la microempresa. ... La autonomía de las empresas y la descentralización del Estado son indispensables para potenciar la participación de los trabajadores en la gestión económica, comunitaria y estatal, logrando el nivel superior de democracia socialista requerido por este complejísimo programa de cambios. (Guerra 2011).¹⁹

And within the state, it is the military that serves as the most potent corporate entrepreneur. (Backer August 30, 2007). Moreover, nothing in the new changes modifies the state-based internationalism of Cuban commercial activities undertaken through ALBA. (Backer 2010). There is good reason for this within traditional Cuban Marxist Leninism.

Unlike the Chinese, who overcame the fundamental problem of privately owned corporations in socialist economies in the victory of Deng Xiaoping in 1979, the Cubans continue to view juridical persons other than the state, or state controlled entities, as a fundamental threat to the Party as the sole representative of the people. But there is a nod to the Chinese approach to Marxist state structure. “Igualmente, el éxito de este proceso depende de una elevación del papel dirigente del Partido Comunista, de un cambio en sus métodos y estilo de trabajo que exige deslindarlo de funciones gubernamentales. El poder del partido, señaló Raúl Castro, descansa básicamente en su autoridad moral, en la influencia que ejerce en las masas y en la confianza que el pueblo deposita en él.” (Guerra 2011).²⁰

It clearly emerges that the principal objective of the state is to convert workers from cost items to revenue generators. The hope is that as a result people will have a larger assortment of goods and services available and the state will not be burdened with the sub-

sidies necessary to provide these items. Work flexibility is taken to redesign the political economy of the Island to increase individual productivity and efficiency as well as to provide a means through which workers can feel more useful, change popular conceptions of work, and to reduce its stigma. And the revenue generated is not merely available to the producers but also to the state in the form of taxes. “El primero de agosto se hacía pública también la aprobación de un régimen tributario para el trabajo por cuenta propia que responde al nuevo escenario económico del país. Que aporte más quien más reciba es el principio del nuevo régimen tributario que ayudará a incrementar las fuentes de ingresos al presupuesto del Estado, y a lograr una adecuada redistribución de estos a escala social.” (Martínez Hernández 2010).

A careful review suggests that the great changes to the Cuban political economy assume a coherent shape that is hardly revolutionary or that otherwise points to a rejection of its current framework. This is change at the margins, even if understood as significant within the framework of Cuban political thinking. As such, control remains the key, and the avoidance of the creation of potential challengers to state-Party power critical. The State controls private economic activity in three ways: First it does not permit aggregations of economic power by individuals. (Lineamientos, Section 3).²¹ Second, the State limits the occupations with respect to which private activity is permitted. And third, the State tightly controls markets open to private activity however it is described. The great opening, so emotively received in the West, in actuality provides a very tightly regulated set of activities within sectors that would not com-

19. Translation: “The basic means of production will continue as property of the state, owned by all the people but forms of property and enterprise in the non-state sector will be considerably augmented in numerous areas of production and services through a big boost in self-employment and microenterprises;... The autonomy of enterprises and the decentralization of government are essential for boosting the participation of workers in the development of the economy, community and state, achieving the highest level of socialist democracy required by this very complex program of changes.”

20. Translation: “Similarly, the success of this process depends on an elevation of the leading role of the Communist Party, a change in its methods and work style that requires that the role of the Party be separated from government functions. The power of the party, said Raúl Castro, lies primarily in its moral authority, in its influence with the masses and the trust that the people place in it.”

21. Section 3 of the Lineamientos provides “En las formas de gestión no estatales no se permitirá la concentración de la propiedad en personas jurídicas o naturales.”

pete with the state for financial power, or otherwise threaten to open society to the possibility of aggregations of private individuals other than through the Communist Party or state approved (and controlled) organs.

This is no less true for those aspects of *Política Social* covered in the *Lineamientos*. But the social sector is understood to remain unchanged, except at the margins. “La educación y la salud gratuitas y universales, la seguridad y la asistencia social, conquistas históricas de la Revolución, continuarán dentro de la esfera estatal, que estará en mejores condiciones de elevar su calidad y continuo perfeccionamiento, logrando mejor servicio con menos gasto.” (Guerra 2011). (Education and free and universal health, safety and welfare, historic achievements of the Revolution, will continue within the state sphere, which will be better able to raise their quality and movement toward perfection, achieving better service at less cost.). Fidel Castro himself signaled this approach with respect to education. (Fidel Castro Ruz July 6, 2011). In a manner that clearly suggested the *Lineamientos*, Castro explained that the march toward educational goals is not error free, but the correction of these errors has produced a system of research and assessment for teachers and support staff that has evidenced the need for the changes started in the first decade of the 21st century, including the repair of schools, the introduction of computer labs at all levels of education, distribution of audiovisual equipment and the inclusion of art instruction in schools.²² (Fidel Castro Ruz July 6, 2011). Castro noted the

movement toward smaller classes, instruction in foreign languages and arts instruction, but also described the move toward education that took advantage of local resources, including family and neighborhood resources.²³ Castro noted the importance of eliminating bad habits as a basic goal of education—these range from bad grammar to bad morals; the education system retains its primary role of educating students in the governing ideology of the state as well as in those skills necessary to be productive members of society.²⁴ (Id.). Still, changes in secondary education remain incomplete and their goals unfulfilled, although they continue in that sector as well as in post secondary and vocational education. (Id.). A key to the success of these changes is teacher training, recruitment and social status. He notes how students increasingly see primary and secondary school teachers as “el profesional de menor remuneración económica, más desgastado en el uso de la voz y en el deterioro de su salud, con gran carga burocrática en la confección de planes, registro de asistencia, control de actividades, revisión a clases, y al cual se le exige por encima de sus posibilidades.” (Id.)²⁵ Castro’s review of the state of education and education reform in contemporary Cuba is emblematic of the contradictions of the *Lineamientos* with respect to education—on the one hand, the pride in the construction of an economic system with few parallels. On the other, the realization that this system is facing fundamental difficulties that may imperil the quality of education—from technology to the qualifications

22. “Todo ese proceso no escapa de errores, pero su corrección ha instrumentado un sistema de investigaciones para todos los docentes y personal auxiliar que han demostrado la necesidad de las transformaciones iniciadas en la década del 2000. Ellas comenzaron con la reparación de los centros docentes, la introducción de laboratorios de computación en todos los niveles de enseñanza, la distribución de módulos de medios audiovisuales a cada aula y la llegada de los instructores de arte a las escuelas.” (Fidel Castro Ruz July 6, 2011).

23. “En el nivel de primaria, las transformaciones dictaminaron un maestro cada 20 alumnos, con profesores en educación física, idioma extranjero, computación y arte que complementan el currículo docente. A su vez se buscó acercar el conocimiento de la historia y de las ciencias con la localidad para que el niño investigue en su mismo entorno social ayudado de la familia y con elementos a su alcance.” (Fidel Castro Ruz July 6, 2011).

24. “Básico en el nivel primaria es la acentuación en la lengua materna de la corrección ortográfica para no crear malos hábitos que se arrastran en el decursar de la vida y la apropiación de un sistema de valores morales que acompañen a la persona hasta su envejecimiento.” (Fidel Castro Ruz July 6, 2011).

25. Translation: The primary or secondary school teacher “is seen as the professional earning the least financial remuneration, whose voice has worn out and health deteriorated, with great administrative burdens in developing class plans, keeping attendance records, controlling activities, class reviews and other tasks that are required of them.” (Id.).

and social status of teachers, with respect to which there may be insufficient funds to remedy.

Many of the economic provisions and, indeed, the overarching purpose and goal of the guidelines will make it difficult to preserve and improve the Cuban education system in its current form. First, the Lineamientos themselves were developed in response to the recognition that the current economic model was both tied to the economic development needs of the State (as represented in the economic provisions of the Lineamientos themselves) and, like the current economic model, unsustainable in its present form. This is not a matter of reallocating resources so much as it is a matter of having no resources to allocate. Nor is it merely a matter of reshaping the educational system, but the need to better tie it, not to the political ends of state building (e.g. Alarcón 2011) but to the economic needs of the Cuban economy and Cuban economic development. Not only has Cuba's economy been battling an uphill recovery from the "special period" following the collapse of its fiscal friend the USSR, but also, the recent global economic downturn has exacerbated an already strained economy. Evidence of the State's concern for economic renewal comes in the form of the elimination of an estimated 1.3 million government positions and efforts to end "expansive subsidies and improper gratuities." (Walsh 2011). Indeed, in his Central Report to the VI Congress of the Party, Raúl Castro commented on the proposed elimination of the ration book, noting that, "this distribution mechanism introduced in times of shortages during the 1960s, in the interest of providing equal protection to our people from those involved in speculation and hoarding with a lucrative spirit, has become in the course of the years an intolerable burden to the economy and discouraged work, in addition to eliciting various types of transgressions." (Central Report to the Sixth Congress of the Communist Party of Cuba 2011). Moreover, expansion of the private sector, co-ops, and the grant of self-employment licenses reflects the Cuban government's hope that its workforce be driven by an economic necessity to work. "That goal is in line with what Raúl Castro himself said last month: 'We have to erase forever the notion that Cuba is the only country in the world where one can live without

working.'" (Lacey 2010) That work, however, is to be undertaken under controlled conditions and subject to the supervision of the state. (Backer Sept. 24, 2010).

Second, it is not clear how effective the State will be in bending education to the needs of Cuban industry. Certainly such an objective has been an elusive goal of developed and developing states for over a century. With regard to the Lineamientos, it can be argued that although the VI Party Congress is correct in that resources need to be directed towards the utilization of new technologies, with the partial opening of the market and Cuba's hope for increased foreign investment and joint ventures, it may be difficult to predict future labor demands and, subsequently, to which technologies to assign limited resources. Thus, there may be a tension between the need to move education to more effectively serve the training needs of the economy and the actual needs of that economy. That tension includes predictability of need, appropriate allocation of resources and lag time. The disastrous example in the United States of preparing a generation of poor people to serve as keypunch operators at a time when such occupations were on the verge of obsolescence should serve as a warning.

Moreover, Cuban education is meant to serve more than as a means of feeding economic needs. It is also organized by the state to promote societal cohesion around the values of the Party and the State. (Alarcón 2011; Gasperini 2000). Such values, as Gasperini explains, are learned and reinforced as part of the curriculum in Cuban schools for two hours per week. These values discourage individualism while encouraging self-sacrifice, cooperation, and solidarity. As evidence of this, Gasperini notes her experience with "emulation" in place of "competition" suggesting that Cuban children are taught that competition is merely one means of self-improvement and not a goal in and of itself. (Id., 12). This is hardly surprising given the socialist ideals of the Cuban state and is subtly or not so subtly reflected in the Lineamientos' prohibition against the concentration of ownership. This is emphasized in the culture provisions of the Lineamientos, particularly Lineamiento 163. Given the goals and motivations out-

lined in Raúl Castro's Central Report to the Sixth Congress of the Communist Party of Cuba, mentioned above, it seems a fine line for the Cuban state to walk. That is, the economic and social policy reform is largely motivated by an economy that suffers due to a lack of incentive to work. The contradiction is, then, how to develop curriculum that will permit members of tomorrow's Cuban workforce to be motivated by economic necessity without obliterating whatever is left of social equality and state economic control. Posed and left unanswered by Gasperini long before the Lineamientos, the question becomes whether Cuban curriculum will be adequate to educate resilient citizens capable of managing risk, change, and uncertainty in an increasingly globalized market driven Cuba whilst maintaining the ideals the State has worked so hard to ground in its citizens. For the future of Cuban educators, it seems that it will take a creative approach to balance socialist ideals whilst not compromising the incentive to work and exacerbating free rider problems. However, creative, qualified, and effective educators may be harder to come by in the not so distant future.

But that leads to the potentially greatest problem identified in the Lineamientos—the fall in the status and compensation of teachers, at least at the primary and secondary education levels, that will make it increasingly difficult to recruit high-caliber people to fill those positions. Historically, Cuba has been able to motivate and retain its educators through continuing education programs, elevation of the professional status of teachers, and, at least in 1999, a 30% increase in teacher salaries. Further, this motivation and retention has translated into quality education by the imposed expectation that all educators conduct research to improve learning and systematize the pedagogical experience. However, with the partial opening of the market, and clear concern for limited resources posed in the Lineamientos, quality educators may be more difficult to find. That is, as noted by Carmelo Mesa-Lago (Mesa-Lago 2002), although Cuba has historically spent a larger proportion of GDP on education than most countries; following the fall of the USSR and the subsequent “special period,” budget expenses for education fell more than 38%. Indeed, although Mesa-Lago notes

that enrollment was only minimally effected during the period of 1989–1997, the economic downturn of the “Special Period” led to a scarcity of materials and resources to maintain educational infrastructure. What may be more important, although efforts of the revolution sought to elevate the professional status of educators, Mesa-Lago notes that the partial opening of the markets and lift on remittance bans have led to income inequalities that have inverted the income pyramid. That is, Mesa-Lago argues, Cuban citizens may earn a much better living in the private sector as a servant, driver, or even prostitute, and data suggests income disparities between public sector wages and those of foreign companies in the nickel or tourism industry. That said, it can be argued that the further opening of quasi-private markets via co-ops, private business licenses, etc., contemplated by the Lineamientos will have the effect of contributing further to income disparities and emphasizing the degree of inversion in the income pyramid. Thus, although the revolution sought to establish the professional status of Cuban educators, the increasing tolerance of free market influences, private enterprises, and unequal access to remittances may prohibit the availability of quality educators.

As a consequence, the Lineamientos open a window on Cuban education that is more honest and transparent than the conventional Western wisdom might have thought likely. First, it suggests the extent to which Cuban education might be understood to be sliding down from the level and standards set in earlier decades. That slide is both a function of economics but also of a cultural shift—teachers are no longer as well respected and their place within the social order has been significantly diminished. Like teachers in developed states, Cuban teachers find themselves less valued, and more worked, than other professions. As in the United States and Europe, then, the consequences are significant for the ability of a state to deliver consistent quality education. The Lineamientos, thus suggest that in this respect, Cuba may no longer be special, but is now facing the same problem encountered in some developed states. But this assessment should be understood in context: “from the very beginning of the revolution to the present one of the most often-mentioned educational problems in

Cuba has been the lack of sufficient numbers of well trained teachers.” (Aguirre & Vichot 1996, 376).

Third, the Lineamientos suggest that the earlier expenditure on brick and mortar projects—large school buildings and other substantial infrastructure, now has become something of a drag on the ability of the state to deliver education efficiently. The focus on the reuse of property and the like serve as evidence of this problem. Obsolete and ill used facilities are expensive. And Cuba has little margin to support such expenses. The maintenance of aging and sometimes obsolete infrastructure drains resources and, more importantly, diverts revenue from investment in new methods of teaching and new technologies, to mere maintenance. Again, as in the case of the social position of teachers, this suggests that Cuba may not be special anymore in terms of the quality of its educational infrastructure. But it does not mean that Cuba’s infrastructure is worse than any in developed states. Magellan Consulting, in the United States, for example, boasts of its usefulness in this regard—and by implication suggests the size of a problem substantial enough to support an on going business profitably.²⁶ That, of course, is the irony of this analysis—school districts in U.S. major cities still may be in much worse shape today than those in Cuba.

Fourth, Cuba is now wrestling with the consequences of globalization and the technological revolution that made globalization possible. Those consequences are technological, financial and political. The technological consequences are obvious—both hardware and software requirements have proliferated and at an increasing pace. These technological advances and their naturalization within education cannot be ignored by those states that seek to maintain a reputation as vanguard elements of global education. But the increasing pace of technological change and its required use in education has also made education much more expensive—a corrugated tin roof, desks,

paper, a chalk board and chalk are no longer sufficient; and Cuba has moved well beyond its initial efforts, a generation ago, to enhance literacy. Competition at the forefront of education system reputation requires substantial and continuing investment—with funds that Cuba is sorely lacking. The emphasis on alternative revenue sources and the utility of education as a revenues source reflects these needs. Lastly, and probably most well known, is the political consequences—globalization and technological innovation in education makes it much harder for Cuban authorities to effectively police the sort of information available to students. That may have a political effect—especially when combined with the emphasis of a family role in education and the tilt from the privileging of political education to education more tightly aimed at serving the economic and market needs of the state. Thus, the focus on technology in the classroom suggests both recognition of the vital importance of technology in education today—especially technology that feeds into the needs of the employment sector. It also highlights the costs of technological investment in education. The Lineamientos imply that Cuba fears that it may be lagging in this respect. The consequences will not be that the population as a whole will suffer, but rather than educational inequalities may be exacerbated.

Fifth, the public focus on family involvement as a critical component of education, and education reform, cannot be exaggerated. As the Lineamientos make clear, the connection between education, sport and culture in the constitution of the socialist individual has been a principal objective of Cuban state policy. That requires control over the educational process without much interference. While it is true that the Lineamientos emphasis on the role of the family can be read as innocuous—that families must reinforce the socialist learning obtained in school—it also signals a willingness to privatize education in a way that may open the door to greater flexibility in

26. They explain: “For educational clients, we employ a standards-based approach to assess how well their facilities are equipped to deliver the instructional mission. An educational adequacy assessment determines what’s missing from instructional spaces, and our team of experienced assessors uses a comprehensive checklist to objectively survey each room for items that include the area of writing surfaces, availability of instructor storage, flooring material, number of data ports, as well as specialty areas such as science labs, art rooms, and media centers.” (Magellan Consulting, *Our Services, Educational Adequacy*, 2009).

the formation of Cuban citizens. Still, the discussion begins to look much like that now on going in the United States, especially if the Lineamientos serve as a mechanism for broadening the role of families in shaping education for their children, especially at the primary and pre-university levels. Yet the focus on the family is not meant to take only one direction. The sport and culture Lineamientos suggest the importance of the family, and the individual within families, as an object of cultural formation and the construction and maintenance of national identity (that itself can serve as a basis for the privatized educational obligations of parents toward their children).

Sixth, the Lineamientos reaffirm and continue the long tradition of centralized control of education and the traditional importance of the political education of Cuban citizens in socialism (Espinosa Chepe 2011a).²⁷ Thus, while the Lineamientos suggest a change of emphasis, it does not purport to abandon the core values around which education policy has been built since 1959. Education retains its political objectives, but it is now rebalanced. The emphasis on the connection between economic need and educational methodologies does not signal the repudiation of the older objectives. While the Lineamientos suggests greater flexibility on income generation, asset use and the creation of innovative programs, there is nothing in the Lineamientos to suggest a fundamen-

tal change in the centralized organization of education. The question that remains unanswered by the Lineamientos is whether this refocusing can succeed. The critic Espinosa Chepe has suggested the adverse effects of this policy at the university level.²⁸ Even friends of the current state apparatus, though, effectively acknowledge the fundamental point. The fundamental objective of the relevant Lineamientos is focused on the development of greater connection between university study and economic productivity. Where they differ from Espinosa Chepe is in the refusal of the Cuban Communist Party to concede that the political objectives of education are not critically important (Alarcón 2011).

There are other effects as well. Continued centralization can substantially affect, adversely, the state's efforts to increase the standing of teachers, especially those below the university level. With little power to affect education policy, teachers will have a harder time increasing their social standing. Additionally, centralization can work against the other professed objectives of the Lineamientos (or at least substantially affect their breadth and character). The most important of these touches on the increased role of families in education. Though families will be charged with greater participation in education, they will continue to have little direct input into policy. That will create a tension that may make reform

27. Espinosa Chepe views this as a negative quality of the educational project in Cuba: "Desafortunadamente, el Gobierno utilizó estas positivas medidas para hacer propaganda dentro y fuera de Cuba, y para controlar toda la educación, luego de confiscar las escuelas privadas, lo cual le permitió emprender un adoctrinamiento político masivo, con la implantación de una enseñanza escolástica, impregnada de dogmas ideológicos que durante decenios dañaron seriamente la formación de las nuevas generaciones, muy en especial en los estudios humanísticos." (Espinosa Chepe 2011a).

28. Espinosa Chepe argues, with Lineamiento 152 firmly in mind: "La considerable merma en la calidad de la enseñanza impartida ha obligado a muchos padres preocupados con la formación educacional de sus hijos, a buscar centros de estudio alternativos. . . . Paralelamente han existido problemas muy serios con la planificación de los profesionales universitarios. Oficialmente se reconoció que en el período 2005–2010 existió un déficit de 110.000 profesionales de las ciencias técnicas, agropecuarias, naturales, pedagógicas, y matemáticas. Mientras hay miles de egresados de otras carreras que exceden la demanda, en particular de humanidades. Además, por muchos años se dejó de priorizar la formación de técnicos medios y obreros calificados, por lo que el déficit es grande de albañiles, carpinteros, plomeros, electricistas, sastres, y otros, mientras los formados carecen de la calificación adecuada. Se pretende resolverlo con premura, pero evidentemente ello llevará tiempo." (Espinosa Chepe 2011a) [trans.: "The considerable reduction in the quality of education available has forced many parents concerned with their children's educational training, to find study centers. . . . In parallel there have been serious problems with the management of university graduates. Officially it is recognized that in 2005–2010 there was a shortfall of 110,000 professionals in the technical sciences, agricultural, natural, educational, and mathematics. Whereas there are thousands of graduates from other courses that exceed the demand, particularly in the humanities. In addition, for many years the training of technicians and skilled workers was prioritized, so the deficit is large masons, carpenters, plumbers, electricians, tailors, and others, while those trainees lack adfecaute training. The aim is to solve these problems speedily, but obviously this will take time."].

harder to implement as the central ministries retain control but monitoring becomes harder as implementation becomes more diffuse. (Aguirre & Vichot 1996, 381). But centralization produces other tensions within the Lineamientos as well—consider for example the tension between Lineamiento 150 tying education to the economic needs of the state, suggesting a focus on the use of education as a tool of economic development, and Lineamiento 153, substantially limiting state subsidy of worker retraining, effectively raising the costs of retraining and reducing its availability to those population sectors most likely to profit quickly from educational targeting.

And lastly, the emphasis on the connection between education, culture, and sport and revenue generation can have a potentially significant effect on the delivery of these services to the population. In effect, the triple focus in Lineamiento 143 on simultaneously reducing costs, raising revenue and privatizing activity suggest that reform may take a variety of directions, not all of which may proceed in the same direction. This is particularly clear in the context of sport and culture provisions. These directions can range from the development of entrepreneurialism among providers of education, sport and cultural activities, to the development of fee structures that can detrimentally affect the quality principle of delivery of educational services. There is a hint at what the Cuban state apparatus has in mind in a 2011 article by Ricardo Alarcón (2011), the President of Cuba's National Assembly. This involves exporting—for cash—the techniques that Cuba employed in the first decades of the post-Revolutionary period to eliminate illiteracy (id., 141) or offering places within redundant sectors, like medical education, to foreigners, again for money (id., 140). These ideas are sound, building on past substantive and propaganda successes, but only if the Cuban state is willing to seek to barter or sell these services abroad, rather than give them away as part of its foreign policy practices. But Cuba could do more. It is possible that the Lineamientos will lead to the development of a substantial on line presence for educational services that mirror similar developments in the United States and Europe. Cuba can expand its provision of education abroad in ways that may serve to generate substantial

revenues (following the American post secondary education model). It might develop an on line distance learning only set of education institutions as now in place in Spain, its National University of Distance Learning (Universidad Nacional de Educación a Distancia) or the United Kingdom's Open University. None of this is clear, and much will depend on the vision and willingness of the educational establishment to experiment.

CONCLUSION

“In political terms, education has been assigned a vital role in the socialist transformation of Cuban society, including the alteration of values and institutions. Educational policy thus reflects the goals of the revolution and their evolution since 1959. It can also, however, be a source of conflict, one that reveals the social basis and cultural practices of power.” (Lutjens, 69). A review of the changes to education, health, sport, and culture in the Guidelines suggests the continuing power of this insight. The real danger for Cuba is that these reforms, like the lukewarm reforms of the 1990s—which also followed the familiar pattern of opening at the bottom to a limited number of individual entrepreneurs—will not produce the self sustaining local economic market oriented enterprises at the core of Chinese-style progress. Betancourt (1999) provides an excellent analysis of the failures of the 1990s reforms.

This outcome is not an accident, but the result of a conscious attempt by the Cuban leadership to maintain absolute political control. It seems to have two basic policies in the economic realm. One is adopting economic mechanisms that yield control of foreign exchange for the leadership, which allows them to buy the support of the elite that makes up its power base and throw some crumbs to the rest (in dissident circles the crumbs are known as *la jabita*, *la merienda* and *la propina*). The other one is rejecting mechanisms that provide permanent and independent access to wealth creation for anyone who is not a member of the nomenklatura, and even to some who think they are members. (Id., at 280–81).

And, indeed, the fear of change may do more to reduce the success of this opening than any machination of Cuba's external enemies. In the case of education it is important to remember “the closeness of

the political and educational institutions of Cuban society and the overwhelming predominance of the former means that only a very narrow range of local-level initiatives to change educational practices ever succeed in becoming policy. These successful claims must “fit” in some fashion within the larger plans of the government before they become policy.” (Aguirre

& Vichot 1996, 381). Sometimes a mania for control may prove fatally counterproductive to the maintenance of that control. The Chinese Communist Party understood this in 1978 (though it took a generation to produce results); it remains to be seen if the Cuban Communist Party will take Raúl Castro’s challenge and open itself to that lesson.

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