

A Marxist focus on Comparative Education in Cubaⁱ

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Abstract

This paper builds systematically on the research experiences of the author, involving the application of a Marxist focus in comparative education studies, in the Cuban and Latin American context. It reflects in a general way the importance of this focus and approach, and in turn the contradictions that occur between formal education policy and that which is achieved in practice. Highlighting this tension allows our research to be an instrument of critical analysis for educational transformation, involving the principal policy makers and actors, educators, and all participants in educational processes.

The reflections and considerations put forward in this chapter stem from the author's formation and professional experience in Cuba as an educator, and through which the influence of Marxism-Leninism in Cuban education, and particularly in the field of comparative education, involves a certain subjectivity. Amongst other reasons, my research to develop this chapter draws on and values my professional practice and my research experience, which in turn situates me as both judge and jury with respect to understanding this reality in Cuba that, in my view, is little studied and highly complex.

Section 1: Some starting points for understanding reality

The formation of educational professionals in Cuba, after the triumph of the Cuban Revolution, was a priority, taken up as part of the wider social transformations that were designed and implemented in the months immediately following this event. The courtroom plea of Fidel Castro recorded in the text, 'History will Absolve me', is well known.ⁱⁱ The speech was part of his defence, having been charged charged with leading the assault on the Moncada Barracks in 1953. This text makes clear that one of the motivations that he and other youths of the group that participated in the assault held was the need to change the social conditions of the Cuban people, and amongst these, education was highlighted. This was reflected, for example, in his claim that "a revolutionary government would initiate a comprehensive reform of our education ... to adequately prepare the generations who are called upon to live in a happier homeland" (Castro, 1983).

Building on these arguments, the first revolutionary measures were directed to the elimination of illiteracy, and to guaranteeing school coverage. This extended to ensuring the necessary infrastructure was provided, including the preparation of professionally trained teachers, such that in each location where a school was built, the required teachers were also supplied. Measures like these led to various forms of training and re-training of professional educators, about which Fidel Castro (1983) proclaimed in his 1953 defence,

the teacher is the soul of education ... at least every five years [they should be given] a 6-month break, with full salary, to attend courses within the country or abroad, so as to keep up to date with the most recent pedagogical knowledge, and to constantly improve their teaching programs and systems (Castro, 1983).

These ideas about the purpose of education within the Cuban Revolution took as a starting point the work and thoughts of José Martí, that synthesized the human essence of this process, observing that “Every person who arrives on the earth has the right to be educated, and the obligation to educate others” (Martí, 2001). This and other postulates of Martí were foundational aspects of the ideological platform of the nascent Revolution, amongst other reasons, because the young revolutionaries saw themselves as heirs of José Martí and his patriotic and humanistic vision.

Given this imperative, and coupled with the belief that education was one of the most valued and important human rights, the Cuban State assumed responsibility to develop and implement educational policy with the people. In this process, many Cuban citizens participated in projects as simultaneously both ‘educators and students’. In this way, to educate others one only needed the necessary disposition to do so, and to know a little more than those who were learning and continuing their education, establishing various ways to do this. The professional formation of teachers, from the first experiences developed from 1960 onwards, established the experience of professional practice occurring simultaneously with academic learning, which was a concrete expression of Martí’s principle of linking work with study. This principle was further consolidated and multiplied in the contributions of Fidel Castro to both the philosophy and practice of education at all levels.

Achievements like these created the context in which the generalised influence of Marxist-Leninist philosophy, in the 1960s, was felt. This general influence contributed to the call for new educational analyses and approaches, within a framework deeply rooted in the ideas of Jose Martí and Fidel Castro. In this way, although the application Marxist-Leninist philosophy seemed foreign, it was harmonized with many of the ideas already being used, and which formed part of the pedagogical tradition in Cuba (see Miranda, 2005).

According to Olivia Miranda (2005), Fidel Castro creatively appropriated Marxism and Leninism through its articulation with the most radical elements of Martí’s thought. Thus, using the theoretical and methodological tools of the ideology of the proletariat, from well before the

insurrection at the Moncada Barracks in 1953, Fidel Castro developed an understanding of the deeper causes and essence of the phenomena of imperialism and colonialism, and their links with ‘under-development’ and the political dependence on imperial powers. The starting point was the anti-imperialist thought of José Martí with his empirical evidence of the essential features of the phenomenon from its earliest beginnings. In a speech celebrating the birth of Lenin, Fidel affirmed:

I have to say that the development of revolutionary thought was strongly influenced by the traditions of our country, by the history of our country, by the liberation struggles of our country. It can be said that the concept that inspired the revolutionary strategy that led to the triumph in 1959 was, in fact, the union, the hybridisation of a tradition, of an experience peculiar to our nation with the essential ideas of Marxism and Leninism (Castro, 1970).

The presence and teaching of Marxism in Cuba, according to Joaquín Santana (1995), passed through three distinct stages up to the date of his publication in the Cuban journal *Temas*. The first began in the decade of the 1960s and was characterised by the large-scale teaching of Marxist philosophy, without imposing a particular or single model for its teaching. This period included discussion and debate about authors banned in other socialist countries, like George Lukacs, Karl Korsch, Louis Althusser, Antonio Gramsci, and Jean Paul Sartre amongst the most prominent; together with other theorists like Che, Fidel, and other leaders of movements in Third World countries.

A second stage occurred in the 1970s, when economic and social developments in the country has a decisive influence on the development of the social sciences, leading to the generalised adoption of the Soviet interpretation of Marxism-Leninism. This was manifest in the use of Soviet teaching manuals and materials in Cuba and in the former Soviet Union, used in the preparation of teachers of Philosophy, Political Economy, and Scientific Socialism. A dogmatic position was adopted that was not supportive of debate within the social sciences in general, nor in education in particular. The Soviet inspired Marxist-Leninist approach was institutionalised as part of the official educational policy set out in the First Congress of the Communist Party of Cuba in 1975.

The third stage began with the collapse of the socialist bloc, or real existing socialism, which produced in Cuba the critical economic situation known as the ‘Special Period’. Within a world dominated by neoliberal globalisation, for Santana (1995) this saw Cuba begin again to look for its own pathways, using analyses from the social sciences.

According to analyses found in a number of publications by Thalía Fung (1999), the consequences of this stage includes some key proposals: a) the central themes that Cuban Marxists adopt, b) a Marxist vision from a third world, Latin American and Caribbean perspectives, c) the influence of the global transitional juncture in the approach of Cuban Marxists, d) the nature and extent of the transition to socialism in Cuba in the examination of

Marxist theory and methodology, e) The critical assimilation of current Marxist thinking, f) the influence of one or another current Marxists in the thinking of different specialisations, g) the use of other philosophical theories in reference to specific questions and problematics. Amongst the publications that take up Marx at their principal subject in the international journal, *Marx Ahora*. To this we can add a regional integrational vision that underpins the model of 'twenty-first century socialism' that began to be elaborated in the year 2000.

From these historical and contemporary contexts we find in Cuban education the declaration of the Marxist-Leninist and Martíist orientation of educational policy, in turn present within the curriculum of Marxist-Leninist philosophy and reflected in the foundations of this and other disciplines. The focus of these disciplines, in relation to the teaching of philosophy, has been transformed as a result of the predominant tendencies in each of the stages outlined above,

approaching scientific methodological foundations that have enabled us today, with a more open approach and thought to the plurality of situations and responses, to analyse the current changing world and, in particular, its complexity rather than disorder, and which foreshadow catastrophes rather than continuities (Fung, 1999).

It is this line of thinking that best distinguishes the way of thinking about and doing education in Cuba, reflected in the general curriculum from primary through to secondary schooling, and in university programs across all specialisations.

The preparation of teachers and comparative education

The training of primary and secondary school teachers in the 1980s was converted into a Bachelor level university degree with three central components: academic, research and professional practice. These components have been modified alongside and in response to developments in the pedagogical sciences, the educational demands of society and the school, and the characteristics of the young people who are being prepared as teachers. This process ensures that the pre-service and in-service training of teachers is constantly improved.

The process of incorporating Marxist-Leninist philosophy in the school curriculum was marked by the same sort of dynamic that developed in the broader society. Initially, this involved the take up of the Soviet approach, involving the organisation of Marxist-Leninist teaching as a distinct discipline, and ensuring that all other subject disciplines in the curriculum took into account the experiences of the former Soviet Union and German Democratic Republic. The collapse of the socialist bloc and its logical consequences impacted on the educational approach put into practice in those countries, but by that time (the 1990s), an educational model had been consolidated in Cuba that harmoniously responded to and incorporated the fundamentals of Martí, Marxism-Leninism, and Fidel, manifest both in pedagogical practice and in the educational sciences.

The field of comparative education was no stranger to this reality. With the title of ‘Comparative Education’ it was included as a subject in the curriculum of the Bachelor of Education program in 1980-81. In these early years the teaching of the comparative education discipline was profoundly shaped by the influence of educational practices and concepts of the former USSR. Hence, for example, the syllabus was developed by the M. V. Lomonósov State University in Moscow, with the materials translated from Russian to Spanish by Professors Sakoloba, Kuzmina and Radionov (1986) in the volume, *Comparative Education*.

Following the Soviet logic, the contents of the comparative education discipline was based on sections of the 1986 volume. It should be noted, however, that Professor Héctor Ferrán Toirac, who was responsible at that time and for many years after for the teaching of this material, introduced themes into the program that were linked directly to the educational realities of Latin America, Africa and Asia. He insisted on the relationship between education and society in his lectures, identifying the class character of education, particularly in countries of the ‘Third World’ where school education was a privilege enjoyed by the few. Moreover, many of the conceptions were derived from developed countries, whether capitalist or socialist, where it was assumed that all citizens of school age were able to attend school, and that it was within schools where processes of exclusion occurred in the form of failure. These conceptions were not valid for the analysis of other realities of the ‘Third World’, such that each case that was studied from the comparative education perspective required a systematic analysis of the economic, political, social and cultural conditions that are in turn reflected and manifested in education.

This practice in the research and analysis, as indicated above, was using a critical and contextualised approach to Marxist philosophy. It was in his lectures that we first heard his reflections about the distance between formal declarations of educational policy, and their enactment in practice, and all of the factors that impact on this reality, but which were not found in our textbooks. Professor Toirac was a pioneer and leader of comparative education from a critical Marxist perspective, demonstrating the importance of these studies for teachers and their understanding of educational policy, the contexts in which these are put into practice, and their role in the application of these practices.

Between 1989-1994, alongside teaching, five “National Workshops of Comparative Education” were developed, which brought a significant number of teachers and academics. For the first time for some, or as a result of sporadic research, comparative studies were presented that called for and required historical, contextual and multifactorial analyses of the educational problems that were studied. These workshops were attended by specialists dealing with contemporary themes and issues of the economy, society, history, issues that were not specifically educational issues, but which influenced school education. In addition, particular problems of the region, which were almost completely excluded from the curricular materials, were discussed. Also of interest in this period is the way in which Cuba was involved in international collaborations, and the presence of a significant number of foreign students on the island, primarily from countries

of Africa, Latin America, and some countries of Asia. The experiences of Cuban teachers working with these groups of students from other nationalities began to be presented in these spaces. These were educational experiences that, without being fully conscious of it, made use of the tools of comparative research, including the recognition of and respect for others.

The collapse of the socialist bloc, and the accumulated experience of popular educators and thinkers of the region like Paulo Freire and Tomas Vasconi, allowed and encouraged a group of educators to develop new experiences in the teaching of Marxism in the school curriculum from the 1993-94 academic year. In essence, this was aimed at supporting a new methodological conception, inheriting a reflexive educational research and practice that made use of the foundations of Marxism in understanding the reality of countries of the South, but did so without ignoring the larger history of science and its traditional ways of knowing. The change was from the name of the discipline, known as 'Comparative Education', to better respond to the breadth of the analyses that were being undertaken, and to use the name that was most widely accepted at the regional and global levels. This saw the inclusion of themes that responded to the reality of the country and the region, that brought us closer to the influence of various Marxisms in Latin America analysed through education, the practice of teachers and social researchers, and the social and political education movements.

In these years an approach to teaching and research was designed to facilitate students' learning of comparative education by comparing. This followed an experience of no more than a decade with little innovation in teaching, and in students' learning. For this reason, different didactic tools were designed, aimed at orienting learning through research, which in turn would shape the discipline as a pathway through which the educator would be able to understand the full extent and complexity of their profession. These efforts to develop the discipline were to some extent carried out in isolation from the processes of analysis and theorisation that were occurring in the United States, France, Spain, Germany and England and in some other countries of Latin America and countries of the former socialist bloc. The Cuban efforts were not sufficiently disseminated in the academic spaces already constituted, within academic journals and publications, and academic associations and organisations.

This isolation demanded the investigation of the essential epistemological problematics of Comparative Education, and characteristics of educational politics and systems, such as the educational problems, currents and tendencies in their multiple inter-relationships, in Cuba and other countries of the region and the world. This was done as part of the already established conception and methods of educational research based on the foundations of Marxism.

All of this helped to generate a number of certainties which served as a starting point to deepen the study and understanding of epistemological problems. These included the observation that historical studies of the discipline mostly took into account only the experience of European countries and North America. Similarly, few studies were found that systematised the different

theoretical and methodological approaches used in comparative research. A conceptual gap resulted with respect to the problems commonly under investigation and the historical and contextual conditions that directly influence education.

Lastly, but equally important, the most widely disseminated research tended to not consider educators and their activity as an essential element in the implementation of educational policies and the problems generated as they are put into practice. Arriving at these conclusions facilitated a fresh look at the history of comparative education and a focus to realise research indebted to Marxist philosophy and its scientific method.

The initial results of this work were put forward in national and international events that had already begun to provide some space for comparative studies. One of these events is worth highlighting – an annual meeting of academics and teachers from Cuba and North America, which has been held for 20 years under the auspices of the Cuban Association of Educators (*Asociación de Pedagogos Cubanos (APC)*). Through its comparative education section, this meeting facilitated Cuba's entry to the World Council of Comparative Education Societies (WCCES), with Cuba being the site of the 2006 World Congress of the WCCES. This space facilitated the presentation of the experiences, hopes and achievements of the Cuban education model, heir of the thought of Martí, materialised under the leadership of Fidel, and exponent of a Marxist conception of education. Other comparative studies carried out by the APC, and those from other educational institutions about comparative Marxist education, supported this work.

It is important to note that these spaces allowed the results of Cuban education in recent decades, from different levels and fields of study, to be presented. This work demonstrated a conception of research and analysis inherited from the fusion of the ideas of José Martí, Marx, and Fidel Castro. This conception, in turn, aligned with some of the assumptions of critical pedagogy, taking into account the starting point in current practice, establishing an organic relationship between historical evolution and practice today, and on that basis proposing new actions to further improve practice, with teachers, students, family and members of the school community playing a central role.

Epistemological demands and the need to respond to educational practice

In an effort to support the scientific character of Marxist comparative educational studies, the classifications used by Soviet and Cuban scientists were called upon, which had set out the main features or characteristics of the social sciences in general, and education in particular, and which looked to the history of science for the essential aspects of its character. Comparative Education was seen as a limited or partial science, in the process of construction and consolidation. This was founded in the work of Cuban scientist Orlando Valera (1999) who defined limited science as that which “arises from the process of integration and differentiation from what already exists, often representing a shift from the established disciplines of scientific knowledge to independent

science”. Science must meet a number of criteria, which are not sufficiently systematised in the case of comparative education. This problem led to a study of the history of science, which in turn affirmed that it is in a stage of consolidation, and that each of the particular requisites of science were being consolidated. According to Valera (1999), the requisites needing to be met for a field of knowledge to achieve scientific status are:

To have a defined and integrally delineated **object of study** in relation to other disciplines of scientific knowledge, allowing one to concretely define the field. To have distinct **methods of scientific knowledge** derived from a central and adequate methodology upon which we can define research actions for defined objects of study and appropriate theoretical foci, methods and techniques. Establish a **set of principles** that represent the general norms and laws of the discipline, and which express the essential relationship between the scientific explanation of new knowledge and already established knowledge. A **body of theory** that includes its conceptual and categorical apparatus, factual knowledge and a **set of norms** derived from its principles and which have their fullest expression in scientific theory, which in turn may be a product of different philosophical-scientific tendencies in the interpretation of the aspect of reality that concerns the particular discipline of science in question, and so can be recognised by schools or currents of scientific thought. The latter is true for the social sciences.

In the same text by Valera (1999), two additional elements are identified as needing to be taken into account in the evaluation of comparative education as a ‘limited science’:

The identified **field of action** refers to: the problems of the science that make up the major challenges that need to be confronted in order to build the associated body of theory, clarify and broaden when necessary the field of action, and develop in a general sense its structure. These problems of science have their most concrete expression in what are referred to as the **tasks of science** ...

A last requirement points to the existence of **branches of science** that constitute specific approaches to the object of study and which may be at different levels of development.

The work outlined above led to the study of the history of comparative education as a science, seen in a series of studies by, for example, Kazamias (1961), Bereday (1968), Noah and Eckstein (1968) and Vexliard (1970). The work of Márquez (1972) was also consulted to include a Latin American perspective, as well as work from academics of the former Soviet Union, led by Soviet Professor Sokolova. In addition, in the 1990s the work of the North American, Erwin Epstein, and more recently the work of Schriewer (2002). These studies required researchers to look for new ways to assess the official history of the field of comparative education as science. These studies did not set out a vision of comparative education based on research into educational practices, which would be considered as the main protagonists of educational policy. A conception was elaborated by the author that considered the above as articulations of comparative studies, and took account of the foundations of Marxism and the practice of teaching and research developed in my work in teacher education.ⁱⁱⁱ

Never-the-less, we can recover some essential epistemological aspects from this foundational work in comparative education, so long as the new or re-reading of it is done from a dialectical materialist approach to understand not only the evolution of the science, but to determine the norms and regularities that would help to provide a new vision. This amounted to a call for the historical study of comparative education as an essential category. This was the socio-educational problem which, in different times and spaces, researchers needed to take into account when putting forward their ideas.

The contradictions at the social level, which generate changes in the design, organization and implementation of policy and education systems, can thus be seen as a socio-educational problem. The interaction of these with major social, cultural, scientific and technical conditions demanded the participation of different actors. The theoretical and methodological response in explaining these problems and the contradictions that they generated, facilitated the re-writing of history in ways that value the contributions that are, by definition, a starting point for new research and analyses. The identification of little known and studied experiences followed which, when systematized, were able to support a more integral development of comparative education, like some of the experiences developed in the late 19th and early 20th century in Latin America. We can conclude then that science of comparative education has moved through three major stages, primarily in Europe and the United States.

Constitutive Stage: developed during the 19th century, in which the utilitarian character of comparative studies was predominant, and the first attempts were made to give these a scientific character.

Building Stage: developed during the 20th century, and characterised by the heterogeneous nature of theoretical and methodological conceptions built through analyses of the planning, organisation, and implementation of educational policy in diverse contexts. Within this stage we can identify three fundamental concepts:

- **Theoretical-Methodological conception** that analysed the influence of contextual factors in the planning, organisation and implementation of policy and national education systems;
- **Theoretical-Methodological conception** based in the assumptions of **Marxist-Leninist philosophy** (from a Soviet perspective); and
- **Theoretical-Methodological conception** from international organisations and institutions, that studied educational phenomena – problems, tendencies, and educational trends – manifest in the implementation of educational policy at the global level, and the development of macro-studies of the planning, organisation and implementation of educational policy at the international level.

The search for new points of reference Stage: developed from the middle of the 20th century to the present, in which we find groups that include those who do not accept that comparative education has established itself as a distinct science because, amongst other reasons, its founding epistemological points of reference are no longer effective, failing to explain educational reality and to develop recommendations. Another group has returned to the fundamentals of Marxism, and includes comparative studies of the experiences of local educational contexts. The essential findings of this historical study are summarised in the tables in Appendix 1.

Section 2: Theoretical-Methodological conception for research in local educational contexts

The basis of this theoretical-methodological conception involves approaching the following as socio-educational problems:

- The identification of an epistemological crisis of comparative education given that its research tends to justify or reinforce established discourse, without supporting the resolution of educational problems,
- The absence or limited recognition of alternative educational theories and practices that contribute to the systemic and critical analysis of social reality and education,
- The widespread implementation of neoliberal educational decentralisation, or other approaches that call for heightened levels of involvement in policy decisions by teachers at the local level.

From this grounding an approach is proposed for comparative studies that uses an expanded vision of the object of science, with a set of principles based on the basic idea of the relationship between schooling and society, school-society relationship, upon which the guidelines carrying out this type of research can be established.

Local educational contexts are included in comparative research as the spaces in which teachers are able to design, apply and evaluate educational policy in a reflexive, flexible and constructive way. This occurs through the implementation of pedagogical practices they meet the demands of multiple contextual factors that influence these spaces, as well as the needs of the individuals involved. We can thus visualise the dynamics generated by local educational contexts as they seek to comply with policy, since it is in these contexts that

- The community of teachers is acknowledged as the protagonist in the processes of policy and system design, implementation and transformation, developing pedagogical practices and reflecting on them, and
- Generating critical thinking through these processes, with respect to the educational problems that arise in the implementation of policy and the possible solutions associated with local practices.

In this dynamic, the construction of knowledge occurs dialectically at the global and local levels, such that understanding particular phenomena can not occur in a way that is abstracted from the inter-dependent relationship with what is occurring at the global level. Similarly, to understand what is occurring at the global level, it is crucial to take into account the processes generated at the local level. Following a Marxist perspective, we need to investigate the established norms in order to identify the relationships that are manifested in comparative research.

The identified norms take into account the nature of school education and its relationship to society. The multiple character of educational policy and systems, conditions the realisation of comprehensive, inter-disciplinary studies, just as educational policy and systems are an essential part of the reality in which they are located. Activity in the schools then reflects the general characteristics of society, mediated by contextual factors and individuals that directly shape the educational spaces and practices developed in the schools. Similarly, the interdependent relationship between broad currents or tendencies in the economic, political, social, philosophical and educational fields, which are manifest in both general and particular settings, condition or shape the educational policies and systems in the social reality of each historical moment, again manifest in particular ways within local educational contexts.

From these regular processes a set of principles can be defined with a logical function – to resolve epistemologically two basic contradictions:

- How to uncover the relationship between the general (the Nation-State) at the macro level, the particular (education policy, educational and curricular design) at the meso level, and the concrete or micro level (pedagogical activity in local contexts); and
- How to assess the relationship between the official policy aspirations and their realisation through educational and curricular design in local school contexts?

1. Principle of the universal inter-relationship between educational problems, currents and tendencies, and their specific manifestations in each local educational context.

The inter-relationship between society and educational systems and policy can be seen at different levels, expressing a universal concatenation of phenomena and processes at the general and particular levels. In general terms, the inter-relationship is seen at the international and regional level. From this perspective we can confirm that the origins of educational policies are very similar across different regions, but their practical implementation produces specific changes in the local contexts in which this occurs. It is within these changes that we can identify the most original, and revolutionary, educational proposals.

2. Principle of the inter-relationship between educational systems and policy, and the demands of the country's contextual factors.

A country's educational system and policy rests in legislation, the organisation of schooling at the national level, and the constant interaction and transformation of these in interaction with contextual factors, making the educational system and policy inseparable from the society in which they are located. The transformations that are produced in society have direct repercussions for education, in the same way that it can generate the significant premises for social change, connected to the dialectical relationship between the economic base and social superstructure of society. These conditions mean that education systems and policy are a reflection of the country's history, showing characteristics of its present and from these, a projection of its future.

3. Principle of the inter-relationship between the projected impact of educational policy and the efficiency of its implementation in education systems

The efficiency of policy implementation reflects the dialectical relationship between education policy, education systems and local contextual factors. Education systems and policy can be said to be efficient if they achieve in practice what is set out in formal policy, if their implementation satisfies the current demands of humanity in context, and if there is sufficient dynamism to contribute to the development and transformation of policy and practice, which in turn supports the provision of educational materials and teachers for universal, lifelong learning.

4. Principle of the inter-dependence between local educational contexts and broader contextual factors.

Local educational contexts are the space in which, ultimately, educational policy is implemented and so in which the global-local dialectic is manifest in its most concrete form. Here we are able to see how in these spaces the realisation of educational policy is facilitated, or obstructed, in close relation to the influence of the most immediate contextual factors. It is in these contexts that policy is interpreted, and mediated, shedding light on the peculiarities of pedagogical practices that can be both drivers of change or defenders of the status quo. The recognition of this allows us to make comparisons between the readiness for policy, the real conditions for its implementation, and the results of its implementation, as a manifestation of the global-local dialectic.

The framework provided by these principles allows us to have a systemic overview of educational phenomena that are being studied, uncovering basic contradictions that occur in practice, as well as the human and social contextual factors whose influence must be taken into account both in research and in proposals for change arising out of research. On this basis, the recommendations generated by such research align with the guiding role of the research.

This sort of experience continues to be applied within an extremely reduced space in Cuba, as is the case in other Latin American countries. However, one can acknowledge that, through their application, educators make significant achievements from a critical perspective. The dynamics of educational policy in each context, their distinctive and shared qualities, and the protagonism of educators in their application and defence of their rights from the dynamics of the relationship between the general and the particular, similarities and distinctive qualities, all justify in the last instance the importance of and the real need for comparative studies.

To apply this sort of framework and facilitate research I argue that we need to divide research into distinct stages, so as to visualise the methodology applied and its results in their logical relationship. The first stage involved characterising and defining the object of investigation, and the contextual factors of major importance for the object of investigation, as well as the mutual influences and relationships arising from them. The second stage involves the methodological structure of the investigation which identifies the nature and reach of the comparative study, its variables, and the sources of information or data. The third stage involves the comparison and articulation of recommendations of findings.

This research approach sets out to distinguish itself from other types of comparative research, by explicitly establishing the relationship between formal policy and the actual experiences of everyday practice in local schools. In this approach, working from the particular, it is possible to identify the influences of the general (national and global) level, and the role of teachers within these processes. This also allows us to investigate and substantiate the historical character of the phenomena under investigation, and to analyse the causes, relationships and consequences arising from the basic characteristics of these. Moreover, it can facilitate our understanding of the processes of resistance to change, and the spaces and agents that can be identified as the vanguard of revolutionary transformations, that in turn allows comparative research to facilitate the identification of pathways for and protagonists to lead change, rather than simply justify established policy.

This is a systemic interdisciplinary approach, making use of existing theoretical and methodological frameworks from the social sciences, the hard sciences, and from education, to further establish the essential relationships between the phenomena under examination. At the same time, this approach includes a critical and constructive dimension, seeking to put forward alternatives solutions for change, taking into account the multiple factors and subjects within the different educational spaces. Implementing this sort of approach can support the study and comprehensive assessment of other educational realities, without necessarily setting out particular models to be followed. This in turn can help us to understand the singular or universal nature of the projection and implementation of educational policy at a global level, and its apparently homogenous character, as put forward by countries of the global North as part of so-called 'assistance' packages, without reference to the specific histories, cultures, and needs of the global South.

In addition, we seek to locate educators in conditions in which they can fully understand their protagonistic role in the implementation of policy, and in the design of projects for change that can, in one form or another, solve long-standing problems. This includes problems that are presented as definitive and irresolvable, such as illiteracy, school repeating and drop outs, inadequate academic and vocational preparation, social exclusion and inequity, the negative impacts of external examinations, and the lack of alternatives to university education, to cite just a few examples. Such problems make the participation of all in their solution an absolute necessity.

Some successful applications

As a recent proposal, this work continues to be developed and taken up by other researchers who creatively apply it to their particular projects, the result of which is a new perspective on the history of comparative education as science. This work extends to the impact of the processes of colonisation and neo-colonisation on educational policy in the region, the major implications on the design and implementation of educational policies from international organisations, and preliminary findings with respect to the initial teacher education and its relationship new tendencies. Similarly, research into literacy programs, and the dynamics of University education in recent decades, are other major areas of study. Some of the preliminary findings from this work include the following.

On history

The analysis of educational reality in 19th century Cuba has elaborated the argument that figures like José Martí Pérez established a particular method in the study of countries that he visited and in which he worked, including Spain, Mexico, Guatemala, Venezuela and the United States. The work of José Martí is valued for its

... deep observation of the economic, social and political life of these countries, stopping to study their education systems, schools, teachers, syllabuses and programs, and curricula. Similarly, he [Martí] was aware of the most significant educational reforms in Europe, about which he made both positive and negative references to in his articles: ‘The ongoing respect for Popular Education in Sweden’, ‘Popular education just saved France’, ‘Popular education has given contemporary Germany its great power’ (BuenaVilla, 2000, p. 5).

Prior work allows us to conclude that this distinguished Cuban came to make up for, with this approach, most of the deficiencies that marked the 19th century of travellers simply copying the experiences of others without taking into account that schooling was both part and result of the local contextual conditions from which it originated, and which influence its ongoing modification and reform.

On the question of teaching, as documented by Cruevello de Silveira (1992) and Massón (2006) between the 1930s and 40s comparative education was introduced into University teacher education programs in the Brazilian Institute of Education in 1934, and at the University of Havana in 1945. The case of the Brazilian ‘Institute of Education’ was found to be innovative and revolutionary for its times. The teaching of comparative education was included in the curriculum with the aim of analyzing the Brazilian reality through comparative research with other societies.

From this point on they set out to identify the fundamental educational problems of Brazilian society, to study the experiences of the ‘New School’ movement that was being practice in several European countries and regarded as new paradigm for educational reform and renovation, and to study the so-called ‘modern civilisation’ as represented by North American education. All of this was done with the idea that, armed with this knowledge, future teachers would contribute to resolving the fundamental national education problems. The most advanced pedagogical and scientific experiences of the times were to be taken into account in ways that developed teachers’ critical thinking about educational reality at home and abroad. Cruevello de Silveira (1992) argues that the conception of teaching in the field of comparative education, as well as its objectives, demonstrates how these studies fundamentally different from other experiences developed in the United States of North America.

The Cuban experience was developed by Emma Pérez Téllez, from the Pedagogical Faculty of the University of Havana, in 1944-45. As a result of the first comparative education course developed at the University of Havana, a volume was produced that reported on research conducted by the author and the tasks carried out by students enrolled in the course. The volume uses a didactic approach that seeks to teach the science of comparative education through the research methods of the authors, on the assumption that:

- The subject within the curriculum is distinct because of its interdisciplinary character.
- The participation of students is essential in designing the research tasks to be conducted and the critical criteria that they need to demonstrate in seminars.
- Through the comparative study it is possible to identify key similarities and differences between educational realities and their primary causes.
- The essential problems impacting on Latin American societies are studied.
- A problem-based method is seed as essential for study.

Each task to be carried out by students was the result of their critical reflection on the educational phenomenon under investigation, made possible by using a set of questions elaborated for this purpose. Both cases (Cuba and Brazil) were involved in the early application of comparative studies of other educational realities, facilitating educators’ use of the knowledge and skills of the science through their learning in this course. This didactic conception allowed students’ learning of comparative education to be converted to a means by which educators can

understand and transform their educational realities, by studying and deeply understanding the experiences of other realities.

With respect to history, transformations, and the reality of education policies in the Latin American region since the constitution of the Nations, some generalisations can be highlighted as follows.

- The most widely disseminated studies of educational policies use a periodization that reinforces the principal tendencies that followed the Second World War, ignoring all of the educational proposals emanating from Latin America in the first 40 years of the 20th Century and their contributions to foreign models, which themselves remain insufficiently documented.
- Confirmation that a significant part of the policies and programs of interfering colonial and neo-colonial powers, in the field of education, were not successful. This was because in the Latin American region there was a strong, albeit at times limited political consciousness, sense of sovereignty, coupled with a critical and revolutionary attitude amongst thinkers and educators, making up a powerful influence over the design and application of a unique, endogenous policy.
- Many of the educational policies appeared to have stagnated with respect to solving long-standing educational problems. In many cases these long-standing problems are being addressed through parallel projects and programs classified in many occasions as non-formal education.
- Away from teacher education, the demands of formal education policies and the insufficient preparation to understand the demands of each reform and transformation, many groups of educators in their local contexts make adjustments, innovations and new proposals to meet the educational needs of the populations in which they work.

With respect to higher education, the macro-level policy transformations applied in recent decades have generated particular effects on for university or tertiary education, tied to the impacts of so-called adjustments under neoliberalism, such as the dynamics of the market that underpins them. A widespread set of problems has emerged from the discourse and scientific production and reproduction of proposed, iterative solutions or changes to educational practice, without investigating other existing realities. This in turn leads to the exclusion of some of the real reasons behind the calls for a new and necessary University. Currently, we are witnessing a new phase of regional integration with a range of purposes and levels of development in different parts of the world. In the field of education, comparative studies can lead to the development and implementation of new projects that will support this sort of integration, so long as they seek to create rigid models to be followed which function to classify and exclude us. They need to contribute to the identification of the singular characteristics and potentials of education with the context of globalisation, bringing the possibility to inform educators who in turn, in their

professional practice, may better understand the demands of educational policy and their role in its implementation and in its transformation.

With the goal of supporting Latin American and Caribbean integration, three countries of the region (the Bolivarian Republic of Venezuela, the Republic of Nicaragua and the Republic of Cuba) designed and implemented a Masters of Education Program:

The Masters program will be space for academic research, that brings together researchers, senior officials and education professions from several countries, and in turn prepares new researchers and professionals who contribute directly to the processes of integration and educational development, acknowledging the diversity and the unity of our ongoing interactions. This postgraduate training will be a part of the broader educational programs associated with the ALBA (Bolivarian Alliance for our Americas) project (Bonilla et al., 2014).

In an unprecedented way for the region, academics and teachers are conducting comparative educational research from the point of view of the educational practices, that can accompany educational models that support policies for public education in each case, from a broader Latin American perspective.

Conclusions for further research

To reveal the process of constructing a theoretical position is an exercise that allows us to identify debts, opportunities, certainties and future perspectives that can consolidate not just the theoretical position, but our conviction of the need for it. The fundamental debts related to Marxism and its application to education, tangentially addressed here, is illustrative of how little researched the role of Marxist philosophy in education has been in Cuba, and hence of the urgent need to determine what has and has not supported it, so as to build theoretical and practical perspectives that are heirs of this philosophy. Revitalising Marxist philosophy through the responses that it can bring to satisfying emerging educational needs and the realisation of associated policy is paramount.

In order of appreciation of the opportunities, not sufficiently explicit to those that taught me from this Marxist worldview and who daily cause me to reflect with new questions and analyses, I can affirm that a Marxist approach can help to transform comparative education from a field of study that considers and describes educational realities in isolation from their context and seemingly unable to be transformed, to one that pursues the essence of education's contradictions in all its manifestations, and which in turn ensures that any study and associated recommendations for policy change are feasible in terms of where, who and how they can be achieved.

The certainties from a conviction of the need for comparative education studies, if indeed we aspire to building a community of educators that feel authentically empowered to make and reform educational policy in the interests of the education of new generations. Future perspectives are related to the need to continue working so that researchers, teachers and policy

makers united in this sort of investigation. This has the potential to see educational policy reflect and respond to the needs of the masses, and not become hollow words that fail to meet the true demands of our different realities and their populations.

ⁱTranslated from Spanish to English by Tom G. Griffiths, University of Newcastle, Australia.

ⁱⁱ‘History will Absolve Me’ (*La historia me absolverá*) was Fidel Castro’s self-defense speech. In the speech Fidel Castro based his arguments in an analysis of the reality in which the Cuban people lived, inspired by the ideas of José Martí who was acknowledged as the intellectual author of the 1953 Assault on the Moncada Barracks of 1953, which in turn is recognised as the beginning of the Cuban Revolution that was successful in 1959.

ⁱⁱⁱSome of this work was elaborated in the author’s doctoral studies (see Massón,2005).

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