

Educational Policies and Globalization: elements for some criticism on the international organizations' proposals for Latin America and the Caribbean Islands Countries

Domingos Leite Lima Filho

Federal Technological University of Paraná -UTFPR, Brazil

Abstract

The present work analyses the role of the international organizations in the orientation of educational reforms and reforms of professional formation/ training taking place, in particular, in Latin America countries and in the Caribbean Islands from the beginning of the 1990's on. This article is organized into four sections: in the first one, we situated the public policies in analysis in the context of social reforms during the 1990's; in the second one, we present the empirical foundation of our research on which this work is based established through documental analysis; in the third one, we critically analyze the educational proposals of the World Bank and of CEPAL (The Economic Commission for Latin America and the Caribbean Islands) presented in the previous section; and finally, in the fourth and last part, we dedicate ourselves to the synthesis of the elements of our criticism, followed by the final remarks in which we recognize the analyzed proposals as strategic actions of the international organizations directed towards the redefinition of the role of the State, of the public policies and of the formation of the subject in order to comply with the requirements of the international division of work and of the capital valorization within the context of the political economy of globalization.

Key-words: Educational Policy, Globalization, International Organizations, Education and Work, Educational Reform.

The relation of education with professional formation and insertion in the world of work has been an emphasized theme in justifications of educational reforms and professional formation reforms which took place in Latin American countries as well as in the Caribbean, notably from the 1990's on. The public policies and governmental programs which materialize these reforms commonly refer to sector diagnoses of international organizations which present, among their main arguments, three recurrent questions: the technological innovations in the productive process and the technical and organizational changes related to the last; the contemporary and future requirements of the use of work force and its qualitative and quantitative composition; the organizational and curriculum adequacy of the structures of the formation of the work force, in order to correspond satisfactorily to the new demands of the process of work in times of the globalization of capital. The analysis of these arguments, conceptions,

policies and programs constitutes an important and wide field of investigation, in international as well as national terms, on which research groups and researchers have been devoting attention, under different perspectives and approaches. It is in the discussion of this topic that we formulate the objectives of this work.

1. Education, international division of work and globalization: determiners of the social reforms of the 1990s

As manifestations of national projects being disputed, as consequences of a particular model of the country insertion in the world economical order, as the expression of the hegemony of the capitalist social relations in a particular historical period, it is important to recognize that the educational reforms and the ones related to the professional formation, started in the 1990's, take place in the context of a world of social reforms in which the movements of a redefinition of the role of the State under the hegemonic paradigm of the neoliberal policies are located.

This general orientation has its origin in the presupposition that the economical and political consolidation of the world capitalism is an irreversible and even 'natural' order for the contemporary societies in which the national States should be oriented by the flexibility, de-regulamentation and privatization paradigm, unprevented path for which there would not be another alternative (*There is No Alternative [TINA]*, according to Margaret Thatcher), and not even new possibilities to be created.¹ Despite of the ideological character of such statements, the fact is that worldwide and, in particular, in Latin America, we observe the simultaneous occurrence of reform movements, such as the ones taken place in Argentina, Brazil, Mexico and Colombia in the reforms of their professional and technical educational systems.²

In the Brazilian case, even though the present work does not have the analysis of such policies as its objective, we can point to three legal documents sent out in the middle of the 1990's which have heavily influenced the reform of education and the professional formation and its unfolding, still influential in the course of the events: the law of the guidelines and bases of national education - Lei de Diretrizes e Bases da

¹ See, for example, the argument about the "End of History", in Fukuyama (1992).

² The following educational reforms began in the 1990's: Reforma de la Formación Profesional (Argentina), Reforma del Sistema Nacional de Formación para el Trabajo (Colombia), Proyecto para la Modernización de la Formación Técnica y la Capacitación (Mexico) e Reforma da Educação Profissional (Brazil).

Educação Nacional (BRAZIL, 1996); the Decree 2.208, which establishes the guidelines of the Professional Education Reform - Reforma da Educação Profissional (BRAZIL, 1997); the National Plan of Qualification of the Worker – Plano Nacional de Qualificação do Trabalhador – PLANFOR (BRAZIL, 1995). In a previous study (Lima Filho-, 2002), we have clearly presented evidence of the connections and bonds between the conceptual directions of these documents and the presuppositions and orientations contained within the international organizations documents issued during the analyzed period.

The term “international organization” here employed, refers to the definitions adopted by the United Nations Organization and by international law specialized literature. In this sense, *international organization* refers to “formally organized institutions which have the national states as their members, in a way that, at least theoretically, they could have exerted, within their own acting scope, an authority juridically limited by them” (Vasconcelos, 2005, p.10)).

That is to say, the term “international organizations” refers exclusively to those institutions formed by national states, excluding all institutions, organisms, associations or non-governmental organizations constituted by civil society, even though they may act internationally or have international interests. The relationships between states and international organizations and between the latter are regulated by the United Nations Organization in the document *Vienna Convention on the Law of Treaties between States and International Organizations or Between International Organizations* (United Nations., 1986)

Even though the definitions and the regulations of the treaties clearly establish the sovereignty and the autonomy of the States in the face of the organizations, many studies clearly present the conflicts between the actions and powers of the international organizations and the acting of the national states in different areas of politics and economy. This article aims to contribute with an analysis of those mechanisms of power and their conflicts and contradictions from the analysis of the educational policies.

Without trying to erase the dimension of the specificities and of the structural and conjuncture particularities of each social historical formation, it is reasonable to suppose that the “experiences” or “determinations” which condition these reforms in the field of formation/professional education express the needs and the materiality of the capitalist production relations in a determined situation of hegemony, especially, the

hegemony of the public policies of the neoliberal State in the context of the political economy of globalization.

In this sense, we will discuss the conditions which provoked the emergence, during the 1990's, of the educational and the professional formation reforms in the peripheral countries, giving special attention to the sector documents produced by the international organizations. We have, primarily, to take into consideration that in the world context experienced from the 1990's on, in which the discourse of the integration and of the social mobility through schooling is denied by the practical reality of the social exclusion of an increasing part of the population and the widening of the economical, technological and social gap between the central and peripheral countries, the orientations of the reforms of the educational systems and of the professional formation issued by the diagnoses produced by the international organizations perform an important role as part of the strategy of maintenance of the hegemony of the international economic policy.

In situations of crisis of hegemony, new questions and needs are created in order to maintain the dominant order and capital accumulation, and together with them the need of re-signification of the concepts to preserve and to reconstruct on new bases the dominant consensus and hegemony. In this way, the sector documents of the reforms can be analyzed – apart from their character of specific policies – as part of the more general strategy of the maintenance of the hegemony, in which the discursive practices gain special emphasis.

It is worth noting, in addition, that the formulation of the educational and the professional formation policies with the so-called universal character in the 1990's and its implementation in the peripheral countries of the system of the world capitalist relations occurs through different political processes and negotiations of the combinations of power which involve national dominant elites and the international capital. Furthermore, the consecution of the orientations issued by the international reports occurs through mechanisms of varied adequacy, among which the conditionalities established by the international organizations for the concession of financing, through which the conceptual axes and the policy guidelines to be followed are established.³

³ These conditionalities were being constituted as truly impositions of the policies of economic stabilization and of the structural reforms to which the candidate nations for financing had to submit. Among the first ones, we can highlight, frequently, the maxi-

In this perspective, in the diagnoses and orientations of the international organizations for educational and professional formation policies, the relation work-capital is reduced to the concept of employmentability, capacity which has to be dealt with by the worker himself/herself. On the other hand, the universality of the social rights, above all the rights of public health and education and of work, is reduced to opportunity equality, suggesting that the State should limit itself to promote public policies which guarantee a minimum base of equity, from which the individuals should follow the paths chosen and conquered in accordance with their preferences and competences supposedly determined by the field of the individual action and will.

Effectively, the documental analysis will permit us to observe that the employmentability and equity are core categories of the international diagnoses which inform the sector educational and professional formation policies aimed at the peripheral countries, determining what could be thought of and done in terms of public policies. Such guidelines also play an important role in contributing to obliterate the discussions about the reasons of the exclusion in peripheral nations, withdrawing the discussion from the field of a structural analysis of the social relations of production and of the consequent international division of work. The analysis is, in this way, limited to conjecture about the factual and episodic interpretations or, yet, to the meritocratic field of competitiveness between nations or of the competences of the individuals.

In the following section, we will concentrate our analysis on two sector documents produced by the international organizations which were of seminal importance for the orientation of the reforms of education, of professional formation during the 1990s.

2. Redefinition of the role of the State and educational reforms: diagnoses and international orientations

devaluation of the local currency, the demands of the desindexation of salaries, cuts in public investments in social programs. Examples of structural reforms are the privatization of the welfare systems and state enterprises, the break-up of the stability and the dismissal of public workers, the revision of the legislation about the profit to foreign countries etc.⁴ Although this CEPAL document is from 1992, the edition referred to in the present work is from 1995.

We have selected for an analytical study the following documents: *Educação e Conhecimento: Eixo da Transformação Produtiva com Equidade (Education and Knowledge: Axis of Productive Transformation with Equity)*, produced in 1992 by CEPAL/UNESCO, and *Prioridades e Estratégias para a Educação (Priorities and Strategies for Education)*, organized in 1995 by the World Bank. This study, at the same time that it will concentrate on the orientations and concepts formulated in the texts, will try to relate them to the socio-historical contexts from which they emerge, once we agree with Gentili (1994, p. 117), “the discourses constitute announcing dimensions of a specific type of ideology only understandable in the context of the material reality which determine them.” (my translation)

The documents in question are part of the empirical base of the documental analysis accomplished by the author as part of his doctorate thesis, in which the 1990’s reform of the professional educational system was analyzed (Lima Filho, 2002) within a wide context of educational reforms which took place in Latin America and Caribbean countries. The present topic is, thus, a summarized and slightly modified version extracted from the cited thesis, particularly, from its second chapter, entitled *Education in the scenery of political economy of globalization*.

2.1 Empirical Base of the documental analysis: summarized presentation of the analyzed documents

It is important to emphasize, from the beginning, that one of the criterion which has motivated the selection of these two documents, among the vast number produced by the international organizations during the 1990’s, was the importance given to them by the authors themselves, apart from the presence of the referred documents in an expressive number of bibliographical citations and references, in governmental and institutional texts, as well as in analyses about the policies and educational reforms of the professional formation and of the work relations, especially those taking place in Latin America since then.

The World Bank, in the document *Prioridades e Estratégias para a Educação*, highlights that the referred sector study represents a synthesis of the educational publications and formulations developed by the Bank since 1980 and that it has as its main aim to define the role of the governments in relation to the formal educational system (World Bank, 1995, p. xii).

The World Bank document as well as the one by CEPAL presents a comprehensive sector analysis, in a way that its importance outperforms the field of conjuncture actions and of the determined educational programs or levels or countries and specific sub-regions, to locate itself in the field of the strategic actions which aim to orient the state model and the institutional policies which will be followed in the educational field for the group of countries of low and middle income, in the World Bank conception, or of the continental character, for all countries in Latin America and in the Caribbean Islands, in relation to the intervention of policies of CEPAL.

Apart from this, in accordance with what can be noted in the following tables (1 and 2), the documents have a wide and complex comprehensiveness and are very similar in their structure.

Both of them present an extensive introduction in which they contextualize the actions of the international organization in the educational field, referred at least to the previous decade (since the 1980s until the year of publication). Following that, after the explicit manifestation of the objectives and the receivers, a summary of the document emphasizing its main points is presented. From then on, the text is divided into parts (four, in the case of the World Bank, and three, in the case of the CEPAL document), in which a historical and conceptual approach of the role of education and an analysis of the experience of educational policies of the focused countries and regions are presented in sequence. Finally, the documents present a set of guidelines, strategies, actions and measures of educational policies which shall be implemented, in a wider way, from the adequacy of the model and the role of the State and, in a more specific way, from the recommended educational reforms

Table 1 presents a form of the document “*Prioridades e Estratégias para a Educação*” (World Bank, 1995), in order to present the structure and a synthetic view of the comprehensiveness of the contents of this first document.

TABLE 1. Documental Form – Priorities and Strategies for Education – World Bank (1995)

I – OBJETIVES OF THE DOCUMENT	
Main Objective	– “the present document deals, mainly, with the formal educational system, and with the role which the government plays in relation to promote access to education, as well as its equity and quality” (p. xii).
II – TO WHOM THE DOCUMENT IS ADDRESSED	
Target	– “low and middle income countries, [that is] ... the traditionally considered developing countries and the ex-socialist countries of Europe and Asia” (p. xii)
III – STRUCTURE AND MAIN CONTENTS OF THE DOCUMENT	
Main Topics	Main Contents
Fundamental questions addressed	– the document synthesizes the analysis of the Bank since 1980; emphasizes the fundamental role of education for the economical growth and the reduction of poverty; highlights the need for the educational reform and for the inversion into human capital in the low and middle income countries.
Prologue	– cites the objectives and the addressees of the document.
Summary	– presents, in 30 pages, a synthesis of the document.
Introduction	– emphasizes the role of human capital as, “main source of the differences of the level of living among nations ... and of differences of salaries” and “main cause for growth” (p. xxi).
First Part: education and development	– evaluates the contribution of education to national development, to the growth of work productivity and to social mobility, based on the neoclassical economical analysis; highlights the best cost-benefit relation in primary education; highlights the role of education for the reduction and relief of poverty. (p.1-9).
Second part: results of experience	– evaluates the “negative” performance of educational systems in low and middle income countries; recommends the concentration of public resources on primary level to raise the efficiency and the equity of education (p.44); highlights the need for autonomy of the institutions and flexibility for the obtainment of resources and funding (p.61).
Third part: six essential reforms	– points to our fundamental problems for education: access, equity, quality and slowness of reforms; – establishes six essential reforms for education: higher priority, higher attention to the results, to centralize the use of the public resources in basic education (initial levels), more attention to equity, more participation of families in the administration and funding, greater autonomy for educational institutions (p. 65-105).
Fourth part: implementation of changes	– orients the action of governments in order to obtain the resources and the implementation of the reforms; – emphasizes the need of the co-participation of the benefiteres and the criteria of evaluation of the programs, orientated by the obtainment of results (p.113-125).

Source: my own

A similar objective is achieved by Table 2 when it presents the documental form of the document “*Educação e Conhecimento: eixo da transformação produtiva com equidade*” (CEPAL, 1995).⁴

TABLE 2. Documental Form– Education and Knowledge: axis of the productive transformation with equity – CEPAL/UNESCO (1995)

I – OBJETIVES OF THE DOCUMENT	
Main Objective	– “to delineate the contours of the policy and institutional action capable of favoring the systemic link between education, knowledge and development ... in a point of progressive social equity” (p.4); “such objective will not be reached without a wide reform of the educational systems ... with emphasis on the primary, secondary, and technical-professional education” (p.5).
II – TO WHOM THE DOCUMENT IS ADDRESSED	
Target	– Latin American countries and the Caribbean Islands.
III – STRUCTURE AND MAIN CONTENTS OF THE DOCUMENT	
Main Topics	Main contents
Preface	– presents the actions which motivated the publication of the document.
Presentation	– presents the central idea, objective and strategy of the document.
Summary	– presents, in 20 pages, a synthesis of the document.
First part: The Latin American context	– Chapter.1. The Latin American development and the proposal of productive transformation with equity: analyses historically the region and presents the strategy of the proposal of CEPAL: basic objectives (citizenship and competitiveness), guidelines of policies (equity and performance) and institutional reform (integration and de-centralization).
Second part: the starting point	– Chapter. 2. Education and human resources in Latin America and the Caribbean Islands: criticizes the “centralization, absence of evaluation, obsolescence” of the systems of primary and secondary education as well as higher education of the region and its low “efficiency, quality and equity” (p. 45-113); – Chapter. 3. The international debate about education and formation of human resources: presents “new educational demands of the enterprises” in the conditions of globalization and international competition; the educational policy shall combine efficiency and equity in order to allow competitiveness and citizenship, for which “eight teachings of the international debate” are presented”: “1. there is an new opportunity; 2.

⁴ Although this CEPAL document is from 1992, the edition referred to in the present work is from 1995.

	<p>nobody innovates disregarding tradition; 3. needed conditions to consensus; 4. prediction capacity; 5. the priority of institutional changes; 6. the evaluation of results as change factor; 7. the equitable access to education; 8. priorities for the results of learning” (p.120-140).</p> <p>– Chapter. 4. Technology, education and development: reinforces the importance of the “incorporation of the new models of accumulation of human capital” (p. 155) in the determination of the dynamics of the growth and of social mobility; adopts as reference theoretical conceptions of enterprise administration and prospective analyses of the educational transformation in order to subsidize the thesis that the “basic conceptual focuses for the elaboration of the strategy and of the educational policies in the region” have to predict: “1. The role of the State: systemic proximity, strategic view, equity and financing; 2. institutional change: opening and decentralization; 3. alignments of policies, in accordance with: performance, quality, professionalization, capacity and development of C&T as activity of market” (p.160-198).</p>
<p>Third part: the proposed strategy</p>	<p>– Chapter. 5. Objectives, criteria, guidelines: the “force idea” is that the educational reforms together with the capacitation and the development of the scientific and technological potential will provide the region with “international competitiveness and with modern citizenship” (strategic objectives); in order to do so, the guidelines of the educational policies have to be based in equity and performance, which have to be combined with integration and decentralization (p. 200-220).</p> <p>– Chapter. 6. Actions and measures: have to be directed towards 1. Institutional context open to the social demands; 2. Universal access to the codes of modernity; 3. Creativity in the access, diffusion and scientific and technological innovation; 4. Responsibility of the institutional administration; 5. Professionalization and protagonism of educators; 6. Financing commitment of the society with education; and 7. Developmental and regional and international cooperation (225-450).</p>

Source: my own

Source: my own

The summarized presentation in this topic indicates the clear confluence of the orientations of the two diagnoses. However, as it is going to be demonstrated in the next topic, it is not only in the structure and in the content of the ideals that the analyzed documents present important similitude.

2.2 The architecture of the texts and the re-signification of the contents

In accordance with what we have already pointed out in a previous text (Campos, Lima Filho & Shiromo., 1999), the structure and the conceptual identity present in different documents of the international organizations and their similarity can be examined from another perspective: the textual aesthetics.⁵ In this perspective, the structure of the texts reveals the existence of a type of “systematic norm” in its construction over which the models of various types of “texts” – tables, graphics, examples samples, narratives, analyses – alternate, displace and combine themselves, allowing a differentiated dynamics of readings, constituting an intra and inter-textual movement, which places the reader/interlocutor in various positions of subject.

The spatial structure of the documents is presented basically in a dual form, through the juxtaposition of two texts: a text which is presented as the main one, in a discursive and analytical form, and other secondary texts, in the format of tables, graphics or descriptions of experiences – national, regional or community ones – successful, in general. However, depending on the reader’s choice or on the specific focus, the secondary and central positions are interchangeable. Thus,

The analysis of “text architecture” allows us to understand the discursive strategies from which they are organized. The “spatialisation” of the discourse, [...] the presence of figures of speech like the metaphor, the obliteration of theoretical references or fundamentals bringing to surface the linguistic recurrence under the form of a comment are some common aspects to all referred documents (Campos, Lima Filho & Shiromo., 1999).

The exemplary use of the particular experiences of each culture and social formation or national State, in conformity to a pre-ordered conceptual logic, maintains a relation with a so-called intentionality of giving universal and scientific status to the recommendations of the texts, which should be rigorously followed by the nations which wished to reach the same standards of success as the ones achieved by the narrated experiences (id., ib.). In this sense, the texts would adjust themselves to the style of the post-modern historiography narrative– as the cultural logic of the latter, that is, of late capitalism –, in which the historical-temporal narrative gives place to a

⁵ In a previous work (Campos, Lima Filho & Shiromo., 1999) we have analyzed the relation between the textual aesthetics and the game of the re-signification and the conceptual and semantic reconstitution in various documents produced by the international organisms, in particular, in *Educação: um tesouro a descobrir* (UNESCO, 1996) document.

spatial-aesthetic dimension obtained through the operation of a collage of fragments of the reality or of various events of distinct nature which affect the “historical register” in order to de-realize and de-naturalize it, giving it a fantastic, magical-realism aura. (Jameson, 1997, p.369). This process of fragmentation of the historical-social context and the re-composition of a new spatial historiography through the distinct re-contextualization of fragments is also described by Canclini (1998, p. 302) as a movement of disconnecting and deterritorialization. The disconnecting occurs through the rupture of the social-cultural relations (collections) chain which can be verified when a singular experience is isolated from the set of practices and symbolic references which give its own meaning in the context of its specific culture.

As we have observed in the analyzed documents, the intricate architecture of the texts can reveal that the epistemology which bases them is presupposed in the “possibility of modifying massive quantities of preexistent discourses [...] in a new code” (Jameson, 1997, p.312). In this fact we recognize the operation of the conceptual reconversion which, throughout the texts, equates educational concepts and theories with the codes of market economy. In this sense, the hegemonic discourse is prodigy. The power of the neoliberal “model”, due to the orientations of the reform underpinned in the analyzed documents, can be recognized in its capacity to deprive other codes of their operability, that is, from its privileged authority to articulate something as truth. Would they not be the specific interest and the focus of the action of the collective intellectuals of capital? Would not the production of reformer texts be part of a decollecting and deterritorialization strategy (Canclini, 1998) which would aim at hiding the existing asymmetry between the central and the dependent countries, and between the subjects of different classes within the same society?

We will, however, return to the main aim of our work about the architecture of the texts produced by the international organizations, after this short, but justified, digression, once form and content cannot be separated. In relation to the content of the two analyzed documents, it is worth highlighting its importance from what their authors themselves declare in relation to the primordial dimension of their own activities and of the mechanisms of the implementation of their orientations. Thus, CEPAL states that the objective of its diagnosis is:

to contribute to the creation, during the next decade [the 90's], of conditions – educational, of capacitation and incorporation of scientific-technological

progress – capable of transforming the productive structures of the region, and accomplishing it in a paradigm of progressive social equity, [highlighting that] [...] such objective will not be reached without a comprehensive reform of the educational systems and of the capacitation of labor force [...] with emphasis [on the reforms] of primary, secondary, high and professional-technical teaching (CEPAL, 1995, p. 5).

In the same way, the World Bank states that:

The main contribution of the World Bank is to be a supporter which has as its aim to help governments in the formulation of educational policies ... consequently, the future operations will concentrate in a more explicit way in a policy for the totality of the sector in order to support the introduction of changes in financing and in the administration of education (Banco Mundial, 1995, p. xxix).

Through these declarations, the international organizations claim the function of “privileged advisers” and definers of institutional reforms and of public policies.

CEPAL considers that the educational systems constitute “a rigid apparatus of slow reactions, impenetrable to the external demands and challenges [...] product of centralization, of bureaucracy and of the corporate encapsulation, evils which do not necessarily need to accompany them (CEPAL, 1995, p. 208). Similarly, the World Bank emphasizes that the reform of the financing and of the administration of the educational system aiming at, among other objectives, giving it more autonomy, presupposes “to redefine the function of the government” (Banco Mundial, 1995, p. v).

It can be verified that the sectorial documents of the World Bank and of CEPAL present a large confluence in the analysis of the educational system, in its current situation as well as in the orientations for its reforms. They advise the low and middle income countries⁶ to consider that “the changes of the institutional context in which the educational, the capacitation and the science and technology actions occur is part of the more global process of the reform of the State” (CEPAL, 1995, p. 222) and, “in these circumstances, the delay in reforming the system of education in a way that it could advance at the same pace of the economical system can mean slower growth and more

⁶ In the study of the World Bank the low and middle income countries are described as “the traditionally considered developing countries and the ex-socialist countries of Europe and of Asia, whose economies are changing from a controlled system to a market one” (Banco Mundial, 1995, p. xii).

poverty than in other cases” (Banco Mundial, 1995, p. 29). The orientation which CEPAL gives for the reform of the State is explicit and precise: “the administrator State, benevolent provider of resources has to be substituted by the assessor State, stimulator and generator of long-term policies” (CEPAL, 1995, p.190).

In summary, the World Bank and CEPAL do not only place themselves in the condition of the formulators of public policies, as well as establish themselves – as the conditionality to help its financing – the immediate need of the realization of State reforms, properly adequate to the neoliberal prescription. Based on this declaration, we can understand the meaning, the comprehensiveness and exactness of the statement of Ianni (1996) – “holy trinity guardian of the capital” – to refer to the international organizations.

Next, we will expose, in a summarized way, the World Bank and CEPAL diagnoses in order to extract from them the elements for a critical analysis of these proposals and for a later verification of the influences of these diagnoses on the reforms of education and of professional formation in Brazil.

2.3 CEPAL proposal: education as a determiner of technical progress and social progress

The central idea of the document *Educação e Conhecimento: Eixo da Transformação Produtiva com Equidade* is that “the incorporation and diffusion – deliberated and systematic – of the technical progress is the motivating force of the productive transformation and its compatibility to equity and democracy” (CEPAL, 1995, p. 3).

CEPAL considers that the formation of human resources is an essential factor for the obtainment of technical progress, in a way that education assumes the central character for the achievement of the development and the reduction of poverty. This idealistic formulation⁷ establishes a mechanic and linear relation: education develops human resources which will contribute for the incorporation of the technical progress; this will, consequently, make the raising of work productivity and the international

⁷ We have considered that this is the appropriate characterization once there is not empirical data which could give a conclusive character of this linearity. On the contrary, there are innumerable international analyses which show the insufficiency of a positive correlation between education and development, between education and income distribution and between development and income distribution.

competitiveness of the nation which, on its side, will return to the population in the form of income raising. This macroeconomic scheme searches for validation in a microeconomic level: individuals who invest in their self-capacitation will be more capable of competing and as retribution they will become successful, expressed in the form of the raising of the individual income. According to Corragio:

The idea of success, for individuals, social sectors and countries, does not suppose the cooperation or solidarity, but the triumph in the competition with others. Being competitive means to have the capacity to overcome the difficulties which the market poses, reacting fast and efficiently to its changes (1996, p. 80).

In accordance with the principles underlying the analyzed documents, once competition is the logic of capitalism and the human capital the basic ingredient in order to reach it, then, the “rational” attitude is that the countries, through the adoption of the “right” policies, and individuals, through the use of their talents and efforts, exert themselves considerably to face the market reality, supposedly, natural, free and open to the perfect competition between individuals and nations.

The theoretical principles which underlie CEPAL diagnosis base themselves on “recent theoretical contributions to the study of the links between education and economical development” (CEPAL, 1995, p. 5). This explicit reference helps us understand that the elaboration constitutes an updating of the theory of human capital. Among the referred contributions, CEPAL emphasizes that “some recent prospective analyses⁸ show the theme of transformation of education as a fundamental aspect, linked to the protagonism related to knowledge when considered the most important factor of the new productive paradigm” (id., ib., p. 175).

The strategy adopted by CEPAL bases itself in the following triad: *competitiveness*, as the objective which consolidates citizenship; *performance*, as the policy guideline for the accomplishment of equity; *institutional reform*, directed to the decentralization as a strategy for the implementation of the proposed policies.

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CEPAL (1995) uses in its diagnosis the analyses of Naisbitt & Abuderne (1990), Toffler (1990), Gaudin (1990), Gorz (1988), and Reich (1991).

In this sense, aiming at the formation of consensus over the institutional reform, CEPAL proposes a set of actions and measures, whose implementation has to be supported by “consensus or agreements between the main social actors” and “whose central principle is that the drafts of defined policies are valid for all countries [in Latin America and the Caribbean Islands], although the forms and sequences in the application may vary considerably.” (id., ib., p. 215).

The proposed actions and measures are:

- a) to generate a institutional context of knowledge open to the social needs;
- b) to guarantee universal Access to the cultural codes of modernity;
- c) to give a higher level of creativity to the access, diffusion and scientific-technological innovation;
- d) to create the responsibility of the institutional administration;
- e) to support the professionalization of teachers and the valuing of their role;
- f) to develop regional and international cooperation (id., id., p. 221).

2.4 Priorities and Strategies (of the World Bank): education and professional formation as a factor of economic development and of poverty relief

The World Bank begins its sector document stating that

Education has a decisive role in economic growth and in the reduction of poverty. The evolution of technology and economic reforms are provoking extraordinary changes in the structure of the economies, of industries and the work market around the world. The speed in which new knowledge is acquired and in which technological changes are produced creates the possibility for obtaining a sustained economic growth and that the job changes become more frequent during people´s lives. These circumstances determine two fundamental priorities for education: to respond to the rising demand from the economies of the adaptable workers capable of acquiring new information without difficulties, and, to contribute for a Constant expansion of knowledge (Banco Mundial, 1995, p. iii).

Thus, similarly in the CEPAL document, education, in the World Bank diagnosis, occupies a role of centrality in the technological progress and the linearity between the formation of human resources, economic growth and poverty reduction is established.

The theoretical-methodological principle applied by the World Bank is the neo-classical economic analysis which, in relation to the educational level, finds its formulation in the theory of human capital. Based on this theory, the World Bank changes the reality produced by the capitalist imperialism and states that “the main source of differences in the level of living standards between nations are the differences of human capital, which are also, in a strong sense, product of education” (*ibid.*, p. xxxi). In another sounding statement in which the determinations produced by the capitalist social relations are, absolutely, relegated, the World Bank concludes that “the main driving force of economic growth is the accumulation of human capital, that is, of knowledge” (*ibid.*, p. xxxii) and continues as follows:

A technological revolution is transforming the world economy once it is deepening the function of *knowledge as the driving force of innovations and of the rise of productivity* [...]. In order that the developing countries take advantage of an economy based on knowledge, they need systems of education which provide the population with technological knowledge and make them receptive to the innovations (*ibid.*, p. xxxii, italics mine).

The belief in knowledge as the organizer of the social production or social relations of production and as strategic resource for the achievement of employmentability and of sustained development is present in both diagnoses. The World Bank considers that:

The speed in which new knowledge is acquired and in which technological changes are produced brings the possibility of achieving an economic sustained growth and that the job changes will be more frequent in lives of people. The different tasks related to work require less manual abilities; thus, the jobs are more abstract and, more and more, separated from the physical processes of production (*ibid.*, p. xv).

In this way, in the conception of the World Bank, the centrality of knowledge today would reinforce the classic formulation of human capital theory, according to which education, economic development and the distribution of income maintain, among themselves, a linear cause-effect relation.

However, both diagnoses, due to having the centrality of their analysis on “education and knowledge”, offer only a biased and partial interpretation of reality. Although we do not disagree with the central importance of knowledge for social organization and development, we criticize the “economy of knowledge”, because we are certain that knowledge cannot be taken into consideration “in itself”, isolated from the material conditions of production and from the other economical and national and international political relations. It is important, in our opinion, to consider that the established relations are not monolithic, from the cause-effect type, but they come from mediations, mutual influences, multiple and complex determinations between production, knowledge and the socio-economic political organization.

However, carrying on with the linearity and monolithic causality of its analysis, the World Bank considers that:

The contribution of education [for the economic development] can be calculated by its effect over productivity, using the difference of income of individuals with and without a specific type of education and comparing that difference with the cost applied by economy in the production of this education (Banco Mundial, 1995, p. 3).

Therefore, the priorities and strategies will be defined by the economic calculation capable of identifying the best cost-benefit relation, the one which produces the best result in terms of greater social rentability, to explain in the Bank language. In this way,

The high rates of rentability calculated for primary and secondary education⁹ in most developing countries clearly indicate that the inversions directed to upgrade the school applications and to improve failure in primary and secondary school should, in general, be the inversions in education of the highest priority in countries which have not yet reached the universalization of this level of teaching. (ibid., p .xxiii).

⁹In the concept of the World Bank, the basic education consists of the first eight grades of schooling, while in Brazil, according to the Ldben (1996), basic education consists of primary, secondary and high school, with a minimum duration of eight years and three years, respectively.

Apart from this, it is also a form of making the labor force more available, because,

Education, specially, the primary and secondary of the first cycle (basic education), helps to reduce poverty rising work productivity of poor people, reducing the fertility and improving health, and providing for this population the necessary aptitudes to fully participate in economy and in society (ibid., p. xv).

In summary, the strategy defended by the World Bank in order to make its proposal feasible is based on the primordial inversion of the public resources to basic education as an equity policy, in private financing for the other educational levels and in an institutional reform which autonomy and flexibility are guaranteed for the educational institutions, following the paradigms of enterprises and focusing market.

In this perspective, acting similarly to CEPAL, the policies formulated by the World Bank involve the recommendation of “six essential reforms [which], together, will contribute for the low and middle income countries to solve their problems of access equity, quality and speed of the reform which they promote nowadays” (ibid., p. 65). The reforms are as follows:

- a) to give higher priority to education;
- b) to pay more attention to productivity;
- c) to invest more and more efficiently in public basic education, as well as to draw on family financing for higher education;
- d) to give more attention to equity;
- e) to intensify the participation of the families in the education system;
- f) to give more autonomy to the institutions in order to allow a more flexible combination of the educational inputs (Banco Mundial, 1995, p. 65).

As we have mentioned, the diagnoses of CEPAL and of the World Bank coincide with each other in their central ideas, theoretical principles and strategies. The formulated policies, as predictable, are also very similar. The seven “actions and measures” recommended by CEPAL and the six “essential reforms” defined by the World Bank can be summarized as follows: institutional reform which orients the educational system towards an enterprise configuration _ instead of being an educational system, it becomes an educational market; inversion of public resources,

most importantly in primary and secondary education; full administrative and financial autonomy including responsibility for cost through progressive privatization of the other levels of education; evaluation, performance and financing policies based on the criteria of the neoclassical economic analysis; definition of priorities through the cost-benefit relation.

3. Criticism against the central elements of the proposals of CEPAL and of the World Bank for Education and Professional Formation

In this topic, we will articulate some criticism about the constitutive elements of CEPAL and the World Bank proposals. As we have already seen in the previous topics, the economic value of education constitutes the central conceptual nucleus of the analyzed documents, from which the recommended educational policies and professional formation are formulated for the low and middle income countries.

The diagnoses in analysis are based on the presuppositions that education produce decisive effects over work productivity and over national development. Those presuppositions are present in various sector documents produced throughout the 1990's by the international organizations and, as we have seen, in both analyzed documents. Those organisms attribute to the deficiencies of the educational systems the reason for the maintenance of the underdevelopment and of the economic crises in the southern hemisphere countries. Chomsky & Dieterich (1999), denying those monolithic causal explanations to underdevelopment and to the dissymmetry of the center-periphery system which characterizes world capitalism, particularly, in relation to Latin America, considers that:

It is certainly demagogic to sustain that the Latin American misery is the result of deficient education in the subcontinent, when there is a series of determining variables of similar or greater importance, as the external debt, the elite corruption, the First World protectionism, the lack of internal savings, the capital runoff, the absolute poverty and the extremely unequal income distribution (1999, p. 120).

Thus, agreeing with this author's reflections, we understand that the possible reason for the educational policies of the international organizations for Latin America can be found in the role occupied by the countries of the region in the international division of work. A significant part of young Latin American people find themselves unemployed when they leave school or they will have low quality work or will be sub employed, being kept in the industrial reserve army or in an informal economy. Only a small portion of them is going to get into the formal work market, the majority in service activities and simple work, in such a way that the World Bank has no interest in supporting the financing of educational projects of higher levels of schooling, only for a tiny little portion of those millions of young people. In this sense, the educational policies formulated by the World Bank and CEPAL would be orientated by pragmatic and utilitarian decisions of the interest of capital, that is, maybe similar to the old proposal of Adam Smith (1983) for an education for the worker in the proportion of the demands of the reproduction of capital . Still in accordance with Chomsky & Dieterich,

The problem of the World Bank is precisely because it thinks about instruments to allow the institutionalization of this type of dichotomous educational system which, on the one hand, provides indispensable 'human capital' to the laboring needs of global capital and, on the other hand, affects the minimum of its profits, that is, obtaining a high coefficient of cost-benefit. (, 1999, p.123).

Through this presupposition, education, economic development and social mobility are linearly associated. It is suggested that the educational policy thus orientated would have a transforming potential capable of rescuing the low and middle income countries from the condition of "setback", of which they would be historical victims due to the insufficiency of their human capital stocks and from the inefficiency and inequity of their educational systems. The argument works as a type of religious metaphor, whose aim is the occultation not only of the sources of underdevelopment, unemployment and poverty in the periphery countries but also of the real interests of the central countries of the capitalist economy.

In this way, the human capital theory would intend to offer, above all, a so-would-be "scientific" justification for the social inequalities. For those who are in a comfortable financial situation, it is comforting, and it is also useful as a defense against

the proposals for a more egalitarian income redistribution, the argument that attributes its higher income to the individual productivity of the person (innate values) and of their effects (the acquired qualification). It also offers, for those of lower income, an “exemplary” path. It is believed that “each person can decide, individually, which investment to make in him or herself, everything is a question of choice” (Needs Reference).

The principles of human capital theory soon revealed themselves as inconsistent and insufficient, not only for the more accurate theoretical analysis but also for the observed empirical experiences in an international context.¹⁰ According to this theory, “the income rise of the labor force depends basically on the expansion of their productivity” (Schultz, 1985, p. 101). However, the deep dissymmetry verified in the work offer and in the value of the salaries, in a national context as well as in the international one, among other structural reasons of the capitalist production relations, soon revealed the impossibility to establish a so-called positive correlation between these variables and the inversion of human capital.

A classic case is the analysis of differences of work conditions and of workers’ payments of the large multinational enterprises between the units situated in central countries and the plants situated in the periphery countries. Between industrial plants, it is possible to admit differences in productivity of workers at equal positions, however, with no chance it is reasonable to suppose that such differences reach amounts ten times superior, as the salaries of *Volkswagen* metallurgists in Germany compared to their equals in the Brazilian and Mexican plants.

Thus, the two sector documents analyzed here aim at operating an update of the neoclassic theorizations for education, through a proposition of a new look at human capital theory, maintaining, however, its four main characteristics, that is: subjectivization strategy, interpretative deviation of reality, conceptual reductionism and economic mechanism. Present in the theoretical principles of the proposals of CEPAL and the World Bank, these characteristics, in fact, are not something of a novelty in relation to previous formulations of these international organizations. Human capital theory, formulated on the same principles, became, still at the end of the 1950’s and the beginning of the 1960’s, as the expression of the needs of the capital in its monopolist period and of the interventionist State. Apart from their update characteristic, the

¹⁰ In order to have a more comprehensive discussion view of the topic, see Singh, 1994.

novelty present in the diagnoses in analysis is that a new element is included in them: the educational guideline of the “equity policy” based on the concepts of “abilities and competences”.

Through the analysis made so far, we have verified that the update keeps the centrality of education – in a macro and micro-economic level –, but now it is combined with two new arguments: the change in the role of the State and the incorporation of knowledge to production.

In relation to the role of the State, it is argued that the limitation of the public funds and the market freedom demand a redefinition of its context of acting. In the educational field, the priority of the State action is recommended for the first grades of the basic education, through policies which are based on equity. Beyond the first levels, the individuals shall be the only ones responsible for the financing of their schooling and development of their “human capital”.

In relation to the rising incorporation of knowledge of production, to which many refer to as a scientific and technological revolution which would determine a new social organization of production, the argument is that the radical and continuing transformations would demand a process of qualification and ongoing development of abilities and competences, for which the workers would be responsible to develop and to guarantee everyday their condition for employmentability. Thus the inversion in qualification, in the valuing of their “human capital” would become an imperative of survival for the workers.

4. Educational policy required by the globalization of capital

The argument of the incorporation of scientific progress to the productive processes and their impacts over the qualitative and quantitative composition of the work force constitutes one of the most evident paradigms of the political economy of globalization, present in the analyzed diagnoses of educational policies. In the hegemonic discourse of globalization, technology assumes the condition of protagonist. Not technology itself, but the active and adaptive capacity to radical and rapid technological innovation is presented as a maxi-value to be searched and fostered by everybody – individuals and national States – in a context of international and interpersonal relations in which competition and competitiveness are almost naturalized as condition, stage and intrinsic quality of human societies. Allegorically, technological

innovation would be a species of new mythic Prometheus, gifted with the capacity of liberating men from fear and from their necessities. With the technological paradigm, productivity and competitiveness promoter, soon other factors are joined, considered as consequences: the national development and the individual success. The triad knowledge – technological innovation – competitiveness would be the basis on which social and economical changes would lay in the contemporary societies: in a few words, the structural change would be determined from the technological changes.

The central problem of the thesis of technological determinism is to produce a natural identification between technical progress and social progress. Contrary to this World view, we consider that technological changes shall be understood as a social relation rather than a technical or economic factor. In this aspect, it is important to notice that a society structurally based on the exploration of labor force – for what it uses many different resources, including the production and control of technical means¹¹ – would not necessarily have a reason for producing technical means consisted of a would-be neutrality or “natural” capacity of producing the overcoming of the structural bases of this own society (Zubero, 1998, p. 37). In this way, a critical conception of technology has to consider that:

[...] the liberating potentiality of technological changes will not be a natural consequence of the process, but, in any case, it will be the result of the confrontation between distinct social projects: among those who need a free society and those who see such possibility as a threat to their interests (Marcuse, 1998, p. 37).

Contrary to the perspectives offered by the diagnoses of the international organizations, the theoretical and empirical analysis reveals that the world diffusion of the technological innovations and their impacts over the qualitative and quantitative aspects of the occupation of labor force present a profoundly asymmetric tendency. Contrary to a “neutral” or “natural” path, the “technological progress” does not necessarily determine a so-called correspondent “social progress”, but, it is, in fact, conditioned by the social, technical and international division of work and by the

¹¹ Marx notices that it would be possible to write, from the XIX century on, the history of the inventions and machines, as part of the history of the weapons of the capital against the workers’ fights (Marx, 1978, p. 361).

contradictory relations of power and propriety which characterize the capitalist relations of production in its worldwide dynamics centralized and hierarchical center-periphery order.

According to such logic, the international organizations conclude that it would be “reasonable” that the educational policies recommended to the low income countries, be in conformity with the tendencies above for the occupation of the work force in these countries, in particular, of Latin America and the Caribbean Islands. Once those tendencies, maintained the hierarchical center-periphery relations and the unequal distribution of production, point to the reduction of the percentage of work posts of qualified work and to the percentage growth of the unemployed population, it would be “reasonable”, always in the logic of capital, that the educational policies financed by the international banks and organisms give priority to basic education limited to the first grades, in which the acquisition of the so-called cultural codes of modernity constitute the sufficient and necessary educational instrument for the non-qualified work posts. Once the rise of the unemployed population is predicted, the relief of poverty, provided, among others, through the application of compensatory policies of a minimum “capacitation” of the work force, seems to be a “reasonable” policy in order that those excluded people move on to a way of surviving somehow.

Accordingly, the educational proposals offered by the international organizations try to operate the social regulation of the work force under the interests of capital. It is, thus, convenient to consider that from the individual or moral point-of-view, social exclusion is a question of rare or no importance for capital. However, the determination of the work force in the developing countries of the world wide economic system acquires complexity when focused in the systemic or collective level, for the existence of an industrial reserve army play, on the one hand, the historical role of exerting constant pressure to downgrade the value of the work force, that is, it works as a control mechanism of the rate of use-value; on the other hand, it represents a reserve for the capital in the presence of the conjuncture oscillations of the system. Thus, the size and the quality of the industrial reserve army have to be conveniently regulated, to assure that they are sufficiently large and of low qualification in order not to affect the profit rate of capital, and sufficiently small and of high level qualification in order not to pose risk to the political stability and social cohesion and technical needs of the system.

Final remarks

From our criticism against the educational policies proposed by the World Bank and CEPAL previously analyzed, we can summarize stating that the update of the human capital theory and the equity policy are the central arguments which give support to the proposition that the rise of work productivity, obtained through educational increment, would be the key for the achievement of economic development and individual social mobility in the developing countries. In this way, the rise of productivity is presented as an imperative of the new times, whose effects would be equally divided as an improvement for the whole society. The argument offers, on the one hand, a macroeconomic explanation for the asymmetry of the world economic order and, on the other hand, in the context of the microeconomic analysis, a reason for the occurrence and permanence of social inequalities. In accordance with the first one, productivity would generate an international economic competition, which would be translated into economic growth and progress for the nation. According to the second one, the lack of tendency to value its own human capital determines that somebody is not competitive and, for this reason, it would be explained and justified the fact that he/she would be found in a condition of poverty, staying in it.

We have also concluded that the arguments related to the technological progress and the needs of the qualitative and quantitative re-composition of labor force, with the consequent impacts over the educational policies remain subordinated to the needs of promoting the occupational regulation of the labor force. Once, in conformity with the international division of work and preserved the hierarchical relations center-periphery, the great majority of work positions expected for Latin America and for the Caribbean Islands correspond to subordinated and low qualified positions. Thus the oriented educational policies and professional formation correspond to the necessity for the production of subjects for those occupations. In this sense, the technological arguments of the centrality of education and of knowledge present in the diagnoses of the international organizations remain subordinated to a meritocratic and justifying discursive logic, from the macro-social point-of-view, as far as the analysis of the valid educational systems and of the models and roles performed by the national states is concerned; as well as from the micro-social point-of-view, when it touches the logic of the individual competences, abilities and efforts.

In conclusion, the instrumental reason which presides the diagnoses of the international organizations and which orients the processes of education reform and of professional formation in Latin America and the Caribbean Islands seems not to have its source in a would-be malevolent wiliness of the collective intellectuals of the international capital, or in the dominant elite of the national States, but in the articulation of such interests with the logic of the reproduction and accumulation of capital and with the needs which are presented to it in the present stage in which the capitalist social relations try to expand its limits of dominance over ample activities of the social life.

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Writer's Details:

Domingos Leite Lima Filho

Domingos Leite Lima Filho received his Doctorate in Education from the Federal University of Santa Catarina (UFSC). He is a professor of the Post Graduation Course in Technology (PPGTE) at Federal Technological University of Paraná (UTFPR). Coordinator of the Study and Research Group in Work, Education and Technology (GETET).

Contact:

domingos@utfpr.edu.br