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EDUCATION IN REVOLUTIONARY STRUGGLES

IVÁN ILLICH, PAULO FREIRE, ERNESTO GUEVARA AND LATIN AMERICAN THOUGHT

Andrés Donoso Romo

Translated by William Barne

Education in Revolutionary Struggles

Education in Revolutionary Struggles introduces us to the fascinating world of Latin American educational thought in the third quarter of the 20th century. It discusses the contributions of three of the most distinguished intellectuals of the period – Iván Illich, Paulo Freire and Ernesto Guevara – and more specifically their answers to the eternal challenge: What is – or should be – the role of education in the profound, structural and/or revolutionary transformation of our societies? The first part of the book identifies the cultural, economic and political context of the revolutionary years in Latin America. This historical framework is of particular interest because it is the setting for the intellectual and educational debates in which these three thinkers took part. The second part, the heart of the book, expounds in depth how Iván Illich, Paulo Freire and Ernesto Guevara contributed to understanding of how education is linked to the transformation of society. The third and final part highlights the most fertile dimensions of the educational thought of Iván Illich, Paulo Freire and Ernesto Guevara – deschooling, liberation education and revolutionary education, respectively – and analyses the points where their conceptions of "education in revolutionary struggles" converged, complemented one another or diverged.

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For
Mariana, Ana María, Silvio and all those who believe
that love alone makes a miracle out of clay

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Andrés

Introduction

Although determining the true role of education in the construction of juster societies is a quest which has preoccupied Latin American intellectuals for at least a century, the predominance assumed by neoliberalism has made this task increasingly difficult. First because neoliberalism tends to discourage any undertaking which may threaten the social order, and second because it does its best to take educational matters out of the public domain and limit them to the private. These two conditioners have helped to install prejudices, of the kind "education is the opium of the people" or "more education will always be desirable", in any attempt to enter into the subject more deeply. Expressed in more elaborate language, these prejudices are exteriorised in phrases like "education is the key to driving any improvement" or "education is only a functional mechanism for maintaining injustice".

To go beyond these expressions charged with common sense, in other words to enter into a deeper analysis of the links between education and social transformation, the path chosen here has been to examine contemporary Latin American thought. This is a set of ideas, understandings and interpretations shared by a large part of the population of the region and, it may be assumed, well portrayed in the works of its principal thinkers. The latter assumption is based on an understanding that just as intellectuals construct their reflections starting from the symbolic universe in which they act, their intellectual output also helps to form it. In the final analysis, these two synergistic processes strengthen the representativeness of their works.

In this book, contemporary Latin American thought is approached through analysis of texts dealing with cultural, economic and political issues, with special emphasis on texts exploring educational matters. The work will concentrate on the interpretations developed between 1950 and 1980 – the years which preceded the predominance of neoliberalism – as one of the most fertile moments for discussion on how to transform, reform or revolutionise our societies.

Among all the competing currents of thought which sought to explain these themes at the time, in these pages we will address those which spoke of the "new man", "liberation education" and the "revolution".

These were the "losers" in the battle of ideas and for that reason have been condemned to oblivion by the supporters of neoliberalism. This choice is guided, on the one hand, by the understanding that these perspectives were not defeated by argument, but silenced by force of arms; and on the other hand, by the understanding that many of the notions used today in the social and/or educational fields are rooted in the thought of that period.

As an introduction to these perspectives, the analyses presented here will focus on the contributions of three well-known thinkers: the Austrian-Mexican Iván Illich (1926–2002), the Brazilian Paulo Freire (1921–1997) and the Argentinian-Cuban Ernesto Guevara (1928–1967); intellectuals who not only shared a concern to understand the links between education and social transformation, but who achieved reference status in the currents of thought in which they participated.

These thinkers assumed a prominent place among those interested in producing a substantial change in the world, since their understanding bears witness to their clear grasp of the concerns, privations and hopes of the popular sectors of society. They developed this sensitivity by profound study of the difficulties facing these sectors, and especially by immersing themselves deeply in the cultural, economic and political geography of the region. Iván Illich, for example, after entering Latin America via New York – where he worked with Puerto-Rican immigrants – moved to Puerto Rico to work in a university and subsequently settled in Mexico to lead a study centre which trained US missionaries to preach in Latin America.

All three achieved this quality of spokesmen for their peers by successfully appropriating some of the core subjects then being debated, including the notions of development, dependence and revolution. Ernesto Guevara was one of the principal promoters of the intellectual debates of the 1960s, the most fertile period of the Cuban Revolution in terms of ideas and proposals; this role has led many to consider him one of the principal socialist thinkers of 20th century Latin America.

These intellectuals became a mouthpiece for the most restless thinkers of their time because they did not pose as illuminated gods or heroic strugglers. On the contrary, each saw himself as one among equals; they recognised and tried to overcome their weaknesses and valued their own work as they did the contributions of others fighting elsewhere in the trenches for liberation. Paulo Freire, for example, had no hesitation in recognising that some of the central concepts of his proposals were taken from the intellectual medium in which he moved, or in declaring that he had polished his understanding by trying to correct the errors that he observed in his pedagogic practice.

Although each section of this essay can be read independently, it is conceived as a whole; it is therefore most rewarding to read all three parts. The first part, containing three chapters, describes the context in which

the ideas of Iván Illich, Paulo Freire and Ernesto Guevara acquired their meaning. The second, also of three chapters, offers a detailed exposition of the thought of each of these intellectuals on education and social transformation. The third part, consisting of a single chapter, studies the convergences and divergences present in their postulates.

Chapter 1, *The contemporary tensions of Latin America from a historical perspective*, sketches the time frame in which the essay is set from the end of the 19th century down to the 1980s. In this framework, we study the culture, the economy and the politics of the region, always with a view to identifying the constrictions which affected the everyday life of the population, and which therefore formed a substantial part of the challenges which roused intellectuals. The principal difficulties identified relate to the maladjustment of identity produced by urbanisation and industrialisation, with a constant worsening of the distribution of wealth and a ceaseless increase in political violence.

Chapter 2, *Development in dispute among Latin American intellectuals*, offers a panorama of the different currents of thought which conjured up scenarios and possible destinies for Latin America in the mid-20th century. Here the stress lies on the close correspondence between the institutionalisation of the social sciences in the region and the appearance of the concept of development, characterising the different perspectives through which people sought to understand the transformations then in progress and sketching the principal shared features of intellectual practices.

Chapter 3, *The golden years of education in Latin America*, addresses the two great processes present in education in the region in the third quarter of the 20th century: the explosive increase in school attendance and the successive reforms of education systems. It also provides the background necessary for understanding the strengthening of popular education and the elements needed to assess the importance of intellectuals who, like the three analysed here, refused to understand that education was a good or bad thing in itself.

Chapter 4, *Iván Illich, deschooling and the cultural revolution*, unfolds the reasons why this intellectual can be numbered among the exponents of Latin American thought. It also describes the argument that he used to declare that the school system converted pupils into docile consumers of industrial goods and services; and the reasoning which led him to state that only by creating awareness of the urgent need to end compulsory schooling would it be possible to put an end to oppression.

Chapter 5, *Paulo Freire, Latin American thought and the struggle for liberation*, emphasises the importance of Freire's childhood experiences in the configuration of his ideas on education. It also highlights the points that his understanding shared with other perspectives proposed as factors which would help to break down the oppressive order. Further, it shows the basis on which it may be claimed that his principal

legacy, the pedagogy which enabled the oppressed to become aware of the domination that they suffered, was a strategy which complemented other forms of struggle taken up by popular sectors, including the use of violence.

Chapter 6, *Ernesto Guevara and the role of education in revolutionary processes,* shows the reasoning which justifies understanding this intellectual as a self-taught thinker. It also presents his opinions on the importance of education in liberation struggles and the arguments which led him to the understanding that in a revolutionary society, education must impregnate every sphere. Taken as a whole, this information explains a key idea in his thought, namely that the importance of education varies according to the political context.

The final chapter, *Education and social transformation in Latin American thought*, emphasises the core ideas of these thinkers, meditates on the validity which their ideas still possess and expounds the reasoning from which it may be concluded that the understanding of each of them complements that of the others in many aspects.

Iván Illich, Paulo Freire and Ernesto Guevara knew that to contribute to the construction of supportive, decent, egalitarian societies, systematic reflection was of the essence. Thus, analysing in depth the potential of the cultural/educational path to transform reality is an opportunity not only to examine one's own understanding of the issues, but also to understand that education, although not a magic wand capable of solving all the ills of our societies – many of which require political or economic intervention – is a fundamental dimension of any strategy which pursues revolutionary ends.

Part I

1 The Contemporary Tensions of Latin America from a Historical Perspective*

Cultural Nodes at the Beginnings of the Contemporary Period

Profound changes occurred in how the population of Latin America worked and lived at the end of the 19th and the beginning of the 20th century, the results of incipient urbanisation and industrialisation. These changes are accepted to be among the clearest indicators that this period marked the turning point that opened the way to the contemporary period in the region.[1] It is likewise understood that the intensification of these transformations over time and the exacerbation of the problems which appeared in their wake are responsible for the successive crises suffered in many dimensions of reality; and that the overlapping of these crises shaped scenarios in which violence, in all its manifestations, assumed an increasing protagonism.

To facilitate understanding of these interpretations, three dimensions have been distinguished in the contemporary history of Latin America: cultural, economic and political. Each of these will be analysed in turn, observing the mechanisms which increased tensions to the point where they developed into limit situations and/or moments of crisis. This will enable the reader to form an integrated view of the principal problems affecting the region, and at the same time provide a map of the most important matters with which intellectuals concerned themselves.

To achieve adequate historical depth, each of these dimensions will be analysed in a different time frame. The cultural dimension will be addressed by observing events between the latter years of the 19th century and the 1910s; economic aspects will be examined by reference to the years including the two world wars, 1914–1945; and the political dimension will be studied against the background of events from the middle of the 20th century to the 1980s.

To disentangle the great transformations which occurred in the cultural sphere, the first point to consider is that both individual identity and collective culture were modified progressively, and at different rates, as people's old ways of living and working changed. From this perspective, the period from the introduction of the first railways in the middle

of the 19th century to the opening of the Panama Canal in 1914 can be seen as the threshold which marks the start of the contemporary period in Latin America. This was when industrialisation burst in on many societies across the region, the force behind the vigorous proliferation of trains and steamships and the constantly increasing production of raw materials.

Why did industrialisation appear with such energy? It is well known that the beginnings of the technification or mechanisation of productive processes in Latin America, both in farming and mining, were motivated basically by the high demand for raw materials and/or farm products in the North Atlantic countries, which had started their industrialisation earlier. The maintenance of this demand over time allowed industrialisation in Latin America to expand continuously. The process was made more dynamic by factors like the need to satisfy the demands of those people in Latin American countries who benefited from international trade, and to supply families who were newly entering the domains of the monetary economy, i.e. the inhabitants of the towns and cities who no longer produced their own food directly but worked for a salary. As the years went by and these trends became consolidated, shipyards and steelworks began to appear to repair the novel steam-powered machines. Later still, small factories sprang up to produce everyday articles like food and clothing. Well into the 20th century, the development of these processes gave rise to industries producing motors and parts, to replace and/or repair broken down machines.

As a result of all these transformations, the many centuries in which life for Latin Americans was intimately associated with farm labour slipped into the past in the years between 1870 and 1930. Statistics on economic activity show a sustained increase in industrial activity from the end of the 19th century, followed by even more significant growth in the services sector, while there was a marked drop in agriculture.[2] It must of course be remembered that even as the proportion of people working the land fell, their productivity grew continuously with the introduction of new technologies. Thus, while the majority of the labour force worked on the land at the end of the 19th century, by the 1980s this was the case only in Guatemala, Honduras and Haiti.

The most important development introduced by the start of industrialisation, in social and cultural terms, was the systematic appropriation of the lands of peasants and indigenous peoples by the dominant sectors of society, generally by illicit methods. The motivation was to produce goods which could be traded in the markets of world capitalism. This occurred, for example, in the far south of Chile and Argentina, and on the Caribbean coast of Central America. It still continues in the Amazon jungle.

In general, the original inhabitants who managed to survive this despoilment were condemned to one of two fates: some remained on the

land working in the production schemes imposed by their exploiters, either as slaves or paid a pittance; the rest – the vast majority – migrated to the towns which were forming around the railway stations and the ports, thus inaugurating (unbeknown to them) a migratory movement from the country to the towns that still continues.

While there may be many particular reasons why individuals migrate, some constants can be identified. All the evidence suggests that those who lived on the land wanted, on the one hand, to escape from rural violence and the misery to which the new productive schemes condemned them, and, on the other hand, to enjoy the opportunities that they heard tell existed in the cities. It may be added that improvements in transport made migration substantially easier; the displaced population took the same means of transport used to carry the increasingly abundant produce – and never returned. These migratory movements occurred on a local, national and inter-regional scale. In the latter case, the protagonists were displaced people from southern Europe, who settled during these years in the principal ports and cities of Latin America.

Once in the cities, the migrants crowded into old houses in the city centres, and when space ran out built precarious lodgings on marginal land. At the same time, the elites started to move out of town centres to live in exclusive residential complexes, while the new middle sectors settled around the main urban features like squares, markets, stations or barracks.

Thanks to the new arrivals, and to successive improvements in sanitary conditions, many towns, cities and ports began to grow at an astonishing rate. Just as a reminder of how important these sanitary improvements were, life expectancy in Latin America rose from 29 years at the beginning of the 20th century to 47 in the middle of the century and 67 in the 1980s. It should be noted also that this increase in the urban population was balanced by a decrease in rural dwellers: while at the beginning of the 20th century less than one person in five lived in the cities, by the end of the century only one-fifth or less of the population lived in rural areas.[3]

It is this vertiginous succession of transformations that forms the basis for the changes occurring in the cultural dimension, especially as the problems that the economic and social innovations brought with them made it inevitable that they would be questioned. In other words, it appears that rural violence, forced migration, unemployment and exploitation were factors which obliged people to turn to their traditional sources of knowledge in search of relief or answers; and finding none – since for these authorities too such situations were unknown – started to subject them to critical examination. And since resignation did nothing to improve things, little by little people started to assume that the penuries that they suffered were neither natural nor divine, and to understand that these were issues that needed to be tackled. This secularisation

grew stronger over the years, just as the State's influence grew while the Church's power waned.

It is in this kind of cultural vacuum that the idea of the nation became popularised with almost a cult status – a notion already present among the elites of the region at least since the independence movements which erupted at the dawn of the 19th century. One of the factors explaining the effective spread of nationalist declarations was the proliferation of mass communication media – including newspapers and periodicals – and the expansion of public education. The success of these efforts can be grasped if we remember that from this moment onwards the concept of nation would be – for many people – a more than sufficient motive to kill or to die with honour. This is reflected in the wars of the second half of the 19th century which pitted Chileans against Peruvians and Bolivians, or Paraguayans, Brazilians, Argentinians and Uruguayans against each other.

But the massive spread of nationalist discourses did not depend only on the ineffectiveness of the traditional frameworks of interpretation, but also on the fact that they shared, and continue to share, four characteristics which make them irresistible. They were broad and ambiguous, meaning that they could be fitted to the opinions of a wide spectrum of hearers. They tended to appeal to the emotions and the sentiments, greatly strengthening their attractiveness. They spoke in the name of the whole population whom they claimed to represent, making them highly inclusive. And they identified undertakings for the common good, giving a higher meaning to both the actions undertaken and the difficulties encountered.

Furthermore, some nationalist discourses appeared which displayed particular slants, such as Latin Americanism. Among the principal catalysts for this type of discourse were the interventions by the United States in Central America and the Caribbean, for example, in Cuba at the close of the 19th century and Colombia at the opening of the 20th century. While the United States justified its actions with a nationalist rhetoric claiming that they were necessary to safeguard its own interests, Latin Americans, including a significant part of the intellectual community, judged them to be threatening attempts at recolonisation which would not stop until the whole continent was under US sway, and describing them as pathological nationalism, or simply imperialism.[4]

Just as interference by the United States continued, with frequent military interventions in the southern part of the continent, condemnation of its actions was also kept up. The Cuban José Martí and the Uruguayan José Enrique Rodó were two of the principal precursors of contemporary Latin Americanism, a trend that continued to spread over the years through a variety of media, including travel, journals and meetings between intellectuals.[5]

As the economic and social transformations which had affected the region since the end of the 19th century became consolidated, and the

difficulties that they brought with them became more acute, the cultural dimension was increasingly questioned. In other words, as the traditional sources of knowledge began to be found wanting in their mission of making life comprehensible, the concept of the nation worked its way into people's hearts and minds, and with it a new term started to achieve popularity: Latin America. Latin American societies ceased to be what they had always been, and in this transition, still incomplete, the search for meaning and the quest for identity became issues of vital importance for the whole population, not excluding intellectuals.

Economic Dynamics in the Years of the World Wars

While nationalist discourses became installed as effective frameworks for understanding the difficulties brought by economic and social changes, with the passing of the years the problems suffered by Latin Americans tended invariably to increase. Perhaps the most important of the factors which contributed to this exacerbation was the unstable international commercial situation generated by the inter-imperialist conflicts fought out mainly in the northern hemisphere. This instability was evident during the two world wars and was also present during the economic crash which burst in 1929.

The following reasoning will explain how these convulsions affected Latin American economies. When the sales of a substantial part of the raw materials traded by the region's countries fell abruptly – due to altered priorities in the principal buyer markets, the protectionist barriers that they raised and the closure of many trade routes which passed through the theatres of operation of the belligerent navies – a significant fall occurred in the quantity of foreign exchange entering Latin American societies, and more importantly, their public coffers. This was because the principal source of tax income was duty imposed on exports.

As might be expected, the effects of these commercial upheavals were not limited to the economic dimension, since unemployment brought with it political instability and accompanying violence. The case of El Salvador was one of the most dramatic. The 1929 crash caused a precipitous fall in the price of coffee, the country's principal export, which in turn led to a strike involving up to 40% of the labour force in some parts of the country. In these conditions, hunger soon raised its head and its persistence triggered a revolt which was only smothered after the armed forces had killed tens of thousands of peasants and members of indigenous groups.[6]

To navigate the turbulent waters of international trade, Latin American states started to assume an increasingly active economic role. Observing the successful experience of the USSR during the 1929 crisis, which its centralised economy enabled it to meet satisfactorily, some of the dominant sectors of Latin American countries began to embrace an

idea which would be of key importance in the coming decades: planning.[7] Firm in the conviction that the consequences of economic crises could be avoided, the political authorities tried to reorient their productive capacities to satisfy two ends: increasing the number of jobs and increasing the amount of goods. It was thought that this could be achieved by expanding their industrialisation through planning. From this moment, industrial activity was understood to be the principal motor of the region's economies, an important change from the previous decades when it reflected only the dynamism of the primary export sector.

To encourage industrialisation, Latin American states set about consolidating their recently created central banks and setting up a series of agencies devoted to fomenting production. These institutions deployed a range of measures designed for this purpose, such as differentiated taxes on imports, import quotas for certain types of goods and the sale of foreign exchange at differential rates depending on what the money was to be used for.

This progress in industrialisation also implied a need for greater mechanisation and technification of farm work, since together with the urgent need to increase food production to feed the increasing urban population, leaders considered that a solution had to be found to the large numbers of landless peasants, to avoid possible social conflict. In all the countries of Latin America therefore – regardless of the political colour of their governments – the possibility of agrarian reform began to be discussed. Reforms started to be implemented in various countries across the region in the late 1930s, and again, and more intensively, in the 1950s and 1960s. The underlying assumption behind this policy was that the smaller the farm unit, the more efficiently it would produce and the more jobs it would provide. This explains why, despite the wide range of modalities assumed by this reform, the intention in every case was to make use of unproductive land by expropriation of large estates, and to introduce new technologies into production processes.

Although there is no unanimous judgement on the overall impact of the agrarian reforms, analysts seem to agree, on the one hand, that they served to relieve the discontent prevailing among the rural population, and, on the other hand, that the results in terms of production were not as good as planned. This was due in part to the fact that the reforms could not overcome the strong resistance of the *latifundistas* or owners of large estates.[8]

During these years also, the idea began to take root that states should not only be the regulators, promoters and inspectors of economic undertakings, but should also act as entrepreneurs. Thus, as early as the 1920s state incursions can be found into activities like the construction of large public works, the provision of urban services and power generation. This is explained in large measure by the growing interest of governments in controlling the production and distribution of those

consumables considered vital for industrialisation. The classic reference in these matters is Mexico, which nationalised its oil companies in 1938, although in fact similar steps were taken in Argentina in the 1920s, while the most complete application of these precepts is to be found in Cuba in the 1960s.

Where did the resources come from to fund this increased economic role of the state? The specialised literature identifies five strategies followed by states to finance the measures designed to foment industrialisation; moreover, these were superimposed on earlier strategies which they complemented rather than replacing. They were: the use of national capital, the encouragement of indirect foreign investment, the use of loans from official organisations abroad, the promotion of regional integration and obtaining loans from the international private banking system. They are commented on briefly below.

Up until the mid-20th century, industrialisation was financed mainly with national capital. Resources drawn from the excesses generated by the measures implemented to favour local industries, and from the foreign exchange – obtained from the sale of raw materials in high demand by the belligerent nations in the world wars – which due to the hazards of the war could not be used to purchase manufactured products from traditional suppliers.

Immediately after the end of the inter-imperial conflict, when commercial relations between the northern and southern hemispheres were normalised, opinions started to be aired about how advantageous it would be to install subsidiaries of companies or industries based in rich countries, the so-called multinationals, in Latin America. The specialists in Latin America thought it would be desirable because it would lead, among other things, to job creation and an increase in the availability of goods; while the experts in the countries that were emerging from the world war, especially the United States, stressed that this would enable them to extend their businesses by exporting whole factories on very favourable terms. And indeed, when these factories were set up, they enjoyed protected markets, cheaper labour costs than in their own countries and cheaper raw materials because now these did not have to be shipped over great distances. As a result, subsidiaries in Latin American countries obtained such high profits that many ended up absorbing an important part of the local industrial park, as occurred with several car, pharmaceutical and steel companies in Brazil in the second half of the 1960s; and such high profits that in some years the capital sums which they remitted to their head offices as earnings were five times higher than their new investments.[9]

Partly in response to this type of analysis, partly because the extension of economic strategy demanded an incessant flow of new resources and partly also because the social problems arising from the introduction of industrialisation and urbanisation demanded ever-increasing

investment, the idea began to take hold in the middle of the century that, rather than encouraging this indirect foreign investment, it would be better to obtain foreign capital which could be applied according to national criteria. This demand, raised by Latin American representatives in all the regional fora from the moment when the United States government decided to implement a similar measure to rebuild Europe after the Second World War, was not considered seriously until after the triumph of the Cuban Revolution at the end of the 1950s. As a way of neutralising the influence of revolutionary Cuba, the United States, through the implementation of a programme called the Alliance for Progress, committed loans to the region for a total of 20 billion dollars over ten years, which would be considered internally as international aid or cooperation. While all the sources seem to agree that the full amount was never lent, most of them stress that these capitals did help Latin American economies. On the other hand, it must be said that many analysts tend to stress that the main beneficiaries in these transactions were the lender economies: because the loans were transformed into onerous debts, because the money was restricted to use in undertakings which would not compete with producers in the lender countries, and because a large part had to be spent on goods or services from the creditor country, whether or not this suited the convenience of the debtors.

To escape dependence on these dubious cooperation mechanisms, during the 1960s Latin American countries fomented a different strategy to increase their industrialisation: extending national markets through regional integration. This path had already been tested satisfactorily during the Second World War, and in this same decade was also being explored by some European countries. This explains the emergence in 1960 of the Central American Common Market and the Latin American Free Trade Association (the Latin American Integration Association from 1980), the creation of the Caribbean Free Trade Association in 1965 (Caribbean Community from 1975) and the officialisation of the Andean Pact in 1969. Although these initiatives led to a significant increase in trade, they could not satisfy the high expectations on which they were founded, and in the long term the instability of national governments, combined with the resistance of some intra- and extra-regional economic actors, led to them being disbanded.

In the 1970s, when internal capitals and the subsidiaries of multinational companies tended to be deemed insufficient, and when the official loans and efforts at regional integration started to be condemned as inefficient, another economic phenomenon outside the control of the region's countries dealt them a harsh blow. The price of oil, an essential consumable for the economic strategy adopted, rose suddenly, forcing states to indebt themselves heavily to pay for it. In these circumstances, states could only continue to expand their industrialisation programmes by obtaining money from international private banks, the same money

that the banks received as profits deposited by the oil-producing countries as a result of the same operation.

At the end of the 1970s and start of the 1980s, soon after a large part of these loans was no longer being used for productive purposes but to keep the public bureaucracy working and/or to pay off old loans, the inflow of foreign exchange was suddenly interrupted while the outflow of debt repayments continued. The interruption of foreign resources, combined with the obligation to meet existing financial commitments, translated into immediate deindustrialisation and an unparalleled rise in unemployment, want and poverty. These problems led some analysts to describe the 1980s as a 'lost decade' for Latin America, while others, like the Mexican economist Víctor Urquidi, diagnosed that the crisis had been incubating for decades, and perhaps centuries.[10]

The cry "we must achieve economic growth" was heard in the most varied tones and under the most dissimilar banners; in the remotest corners and the most diverse situations people proclaimed that "Latin American societies must match the living standards of the wealthiest countries in the world". Nevertheless, despite the growth achieved – for it is not without reason that the third quarter of the 20th century is identified by some as the golden age of Latin American economies – poverty and unequal distribution of wealth increased to shameful levels. Year after year, inequality increased between different social sectors, between rural and urban areas, between different regions of each country, between countries and, worst of all, between Latin America and more developed nations. In a sort of global strategy game in which the region always played with a handicap, where the dilemma of how to generate the resources needed to allow a level of industrialisation which could improve the standard of living of the population as a whole was never solved, we embarked, as the Uruguayan essayist Eduardo Galeano well understood, on an economic voyage in which there were more castaways than sailors.[11]

Political Conflicts in the Revolutionary Years

At many moments during the 20th century, the economic difficulties of Latin America were so great that traditional political formulae, even populist solutions, became swamped. Seen from a distance, the vicious circle into which Latin American societies lapsed functioned roughly as follows: as spirals of violence increased, the more readily civil leaders abdicated in favour of military rulers, and the harsher life became for Latin Americans. As a result of the conjunction of these elements, practically every country in the region suffered military coups or civil wars between 1950 and 1980. This section will deal with these political phenomena, their particularities and shared features.

Although the predominant image of Latin American dictatorships is that they were right-wing, meaning that they understood the market to

be the principal force by which society was articulated, and although common sense tends to associate guerrillas with left-wing movements, meaning that they confided in the capacity of the State to direct the collective destiny of their countries, history shows that these associations were not always the rule. There were various coups based on left-wing ideologies, like that which seized power in Peru in 1968 and those which echoed it in Ecuador, Bolivia, Honduras and Panama. Likewise, there were various right-wing groups which resorted to arms as their principal argument, among whom were the white guards organised by Brazilian landowners to neutralise imminent agrarian reform in the middle of the century, or the death squads in El Salvador which killed some three thousand people in 1980 alone.

Another characteristic shared by both the guerrillas and the dictatorships is that their leaders belonged to the emerging middle sectors of the population – the same who had appeared at the end of the 19th century with the start of industrialisation and urbanisation. That the military leaders belonged to the broad spectrum of the middle sectors is no surprise – after all, they all lived on their salaries. Where some further comment is needed is on the idea that the guerrilla leaders also belonged to these sectors. But so it was. The top leaders of the Cuban rebels were liberal professionals, some of the guerrilla leaders in Mexico and Peru in the 1960s were teachers, and an important part of the leadership of the Central American, Venezuelan and Brazilian guerrillas, also in the 1960s, were priests, military men and university students. This is confirmed in the analyses by the Brazilian sociologist Marcelo Ridenti of the origins of the members of left-wing armed organisations in his country.[12] He shows that the majority were university students or young professionals, and that many were from the interior but lived in the state capitals; in other words they were immigrants.

Dictatorships and guerrillas also coincided in the fact that their promoters justified their actions by claiming that they were the only way of keeping their countries afloat. This would be achieved, so they said, after society had been rid of all the evils by which it was beset, especially the greatest evil of all: *the guerrillas* for the coup supporter and *the dictatorship* for the guerrilla fighter. While one side used violence to maintain order and promote economic growth, the other used it with the declared object of imposing a different order and promoting economic growth. Thus, there were always "good", "just" and "coherent" reasons for the use of violence. Perhaps the most universal of these reasons was the proposal that politicians and conventional politics needed to be ousted, as they had given sufficient proof of their incapacity to resolve conflicts, channel progress and/or propitiate peace.

Of all the coups in the region's history, that which occurred in Guatemala in 1954 has a special significance. This was because the active participation of US intelligence in this coup means, according to the

interpretation of the Argentinian historian Tulio Halperin Donghi, that it should be understood as the first concrete manifestation in the region of the dispute for world hegemony engaged in by the United States and the Soviet Union after the end of the Second World War: the Cold War.[13] This coup also marks the resumption of US military interventions in Latin America after two decades of abstention. The new interventions were justified by the Inter-American Treaty of Reciprocal Assistance signed in Rio de Janeiro in 1947, and underpinned by graduates of the military academy installed by the United States in Panama in 1948 to influence Latin American officers: the School of the Americas. The ideological horizon within which officers were instructed in this space was the Doctrine of National Security. This doctrine replaced the previous conception of their mission, which consisted in defending their countries from external threats, with one in which the country must be protected from internal "dangers", i.e. communism or even reformism.

After the invasion of Guatemala, other countries – including Cuba, Dominican Republic, Nicaragua, Grenada and Panama – suffered direct or indirect military attacks by the United States. As Juan Bosch, one-time president of the Dominican Republic, understood, these aggressions did not fit into the known patterns of imperialism based on occupying territories to exploit them economically.[14] The aim of the attacks was rather to keep the United States on a permanent war footing in order to expand its military industry, its principal business, and – if successful – to obtain indirect control of the territories through local authorities who would favour it in conventional business. This logic also lay behind the actions of the United States in the war between Honduras and El Salvador in 1969, since – not content with advising the officers of both armies – it sold used or superseded weaponry to both sides.

This strategy of the US, which is still in place, was doubly profitable because it allowed the country to keep its place as the greatest economic and military power, while helping to give it a clean international image as trying to save, liberate or help the affected countries. It should be remembered that Latin America was not the only region which "benefited" from these arms sales. After the end of the Second World War, the arms industry of the belligerent countries supplied arms to the contenders in the more than one hundred and fifty armed conflicts which occurred in the poor countries of Africa, Asia and Latin America.[15]

If 1954 was the key year for the dictatorships, 1959 would be the key year for the guerrillas. Shortly after the incidents in Guatemala, a guerrilla movement triumphed – for the first time – in Cuba. There were two main repercussions in Latin America of the victory of the Cuban rebels: it changed the parameters of the possible by removing the certainty that any structural transformation had to have the approval of the United States; and it opened the way, directly or indirectly, to guerrillas throughout region. Without giving an exhaustive account, the first year

of the Cuban Revolution alone saw the creation of guerrilla movements in Argentina, Ecuador, Haiti, Panama and Dominican Republic. In the following year, 1960, guerrilla action broke out in Paraguay, and in 1962 in Venezuela. Between 1963 and 1965, there was renewed activity in Dominican Republic, while various attacks took place in Peru. Guerrilla warfare broke out in Bolivia in 1966; in this case, the guerrillas enjoyed significant military, economic and political support from Cuba, demonstrated not least by the fact that they were led by Fidel Castro's second-in-command, Ernesto Guevara. As part of this same wave of guerrilla activity in the mid-1960s, armed groups also began to operate in Montevideo, Buenos Aires, São Paulo, Rio de Janeiro, Caracas and other cities around the region.[16]

Dictatorships swiftly appeared in the face of these guerrilla uprisings; between 1962 and 1966 alone nine were installed in different countries across the region. Any government considered inefficient in the fight against communism, or reticent in demonstrating support for the United States, came into the coup-leaders' sights. The degree to which the dictatorships were linked with the United States was such that in 1964 Thomas Mann, US Assistant Secretary of State for Inter-American Affairs, sanctified this order of things by revealing that if governments in the region wished to establish cooperation with the United States, no account would be taken of whether the leaders had been democratically elected.[17]

Of all the dictatorships installed in Latin America, that which seized power in Chile in 1973 is of particular interest, first for the implications of the coup itself, carried out against a government with a socialist project which had electoral legitimacy, and second for the innovative economic strategy that it adopted, neoliberalism, which would in due course be imposed across almost the whole region. As a consequence of the multiple reverses suffered by the guerrilla strategy promoted by Havana, the electoral route chosen by Chile was at first viewed with growing optimism by all those who sought a new path to socialism. The process in Chile became so important that, although one of the region's smaller countries and previously free of active guerrillas, it received more military "cooperation" than most from the United States. Between 1950 and 1970, it received around one hundred and twenty million dollars in military support, to which must be added the four thousand Chilean military personnel who passed through one US military academy or another. Once the dictatorship was in place and dissent was silenced, the economic advisers to the military government, many of them educated in US universities, installed neoliberalism in its most orthodox form. Although guerrilla activity flared up occasionally in certain parts of the region after the collapse of the 'Chilean path to socialism', most especially in Central America, and although the dictatorships continued to blight their countries for a number of years, the conflict never returned to its former level; the critical struggle for hegemony was over.

Life for Latin Americans in the 20th century was full of restrictions, problems and crises. The beginnings of industrialisation and urbanisation – and even more the associated problems – brought down all the old cultural certainties, smoothing the path for nationalism, in its many variants, to become deeply rooted in the population. While the economic measures which, one after another, promised to overcome unemployment and hunger were shown by their rapid succession to be ineffective, the political strategies to achieve harmonious coexistence were swept aside by dictatorships and guerrillas which left rivers of blood behind them, together with a mountain of frustrated expectations, while many of the problems that they proposed to solve remained intact.

This brief account of the principal cultural, economic and political tensions experienced in the region, mapping the principal problems/challenges which affected/worried Latin Americans and their intellectuals, will help to explain how it was that life on this side of the world appeared increasingly to be one huge battlefield. And while for some the object was to survive in the middle of this hostile scenario, for others it was, quite simply, to win.

Notes

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1 Among those who share the view that the contemporary period in Latin America began in this period are González Casanova, P. *Imperialismo y liberación: una introducción a la historia contemporánea de América Latina*, Mexico City: Siglo XXI Editores, 1985 [1979], p. 11 and Fernández Retamar, R. *Pensamiento de Nuestra América*, Buenos Aires: CLACSO, 2006, p. 39.

2 De Olivera, O. & Roberts, B. La población de América Latina, 1930–1990. In: Bethell, L. (ed.) *Historia de América Latina. Economía y sociedad desde 1930*, Barcelona: Editorial Crítica, 1997 [1994], pp. 216, 230 and 241.

3 Although figures differ between sources, all report the same trend; see, for example, Thorp, R. *Progreso, pobreza y exclusión: una historia económica de América Latina en el siglo XX*, New York: BID, 1998, p. 1.

4 Donoso Romo, A. *Identidad y educación en América Latina. Ensayos*, Caracas: Editorial Laboratorio Educativo, 2012, pp. 62 and 63.

5 See especially Rodó, J.E. Ariel, a la Juventud de América. In: Rama, Á. (ed.) *Ariel, motivos de Proteo*, Caracas: Biblioteca Ayacucho, 1976 [1900], pp. 1–56 and Martí, J. Nuestra América. In: Fernández Retamar, R. (ed.) *José Martí: Cuba, Nuestra América, los Estados Unidos*, Mexico City: Siglo XXI Editores, 1973 [1891], pp. 111–120.

6 See, among other sources, De la Peña, G. Las movilizaciones rurales en América Latina c. 1920. In: Bethell, L. (ed.) *Historia de América Latina. Política y sociedad desde 1930*, Barcelona: Editorial Crítica, 1997 [1994], pp. 209 and 210.

7 Hobsbawm, E. *Era dos extremos. O breve século XX. 1914–1991*, São Paulo: Companhia das Letras, 2003 [1994], pp. 101 and 368.

8 On these difficulties see, int. al., Bulmer-Thomas, V. *La historia económica de América Latina desde la independencia*, Mexico City: Fondo de Cultura Económica, 1998 [1994], pp. 371 and 372.

9 Puyana, A. La industrialización de América Latina y el Caribe. In: Palacios, M. & Weinberg, G. (eds.) *Historia general de América Latina, tomo VIII. América Latina desde 1930*, Paris: UNESCO – Editorial Trotta, 2008, p. 84.
10 Urquidi, V. *Otro siglo perdido. Las políticas de desarrollo en América Latina (1930–2005)*, Mexico City: Fondo de Cultura Económica, 2005, p. 512.
11 Galeano, E. *As veias abertas da América Latina*, São Paulo: Editora Paz & Terra, 1983 [1971], p. 267.
12 Ridenti, M. *O fantasma da revolução brasileira*, São Paulo: Editora UNESP, 2010 [1993], pp. 116, 117, 147, 209, 235 and 236.
13 Halperin, T. *Historia contemporánea de América Latina*, Madrid: Alianza Editorial, 1969, pp. 436 and 437.
14 Bosch, J. *El pentagonismo sustituto del imperialismo*, Madrid: Guadiana de Publicaciones, 1968 [1967], p. 20.
15 Escobar, A. *La invención del Tercer Mundo. Construcción y deconstrucción del desarrollo*, Caracas: Fundación Editorial el Perro y la Rana, 2007, p. 69; and Sader, E. *Século XX: uma biografia não autorizada*, São Paulo: Editora Fundação Perseu Abramo, 2000b, p. 111.
16 Prieto, A. *Procesos revolucionarios en América Latina*, Querétaro: Ocean, 2009, p. 214 ff.
17 See Halperin, T. *Op. Cit*. 1969, p. 462.

2 Development in Dispute among Latin American Intellectuals*

The Role of the Social Sciences in the Appearance of Development

The present chapter will cast an overall look on the intellectual environment in Latin America during the third quarter of the 20th century – one of the most fertile periods for discussion in the social sciences in the region – to explore the intellectual scenario in which Latin American thinkers took part, and especially to understand the difficulties which they faced day by day. This approach will be based on three complementary analyses: first of the structuring condition acquired by the concept of *development*; next of the different currents of economic and cultural thought which sought to circumscribe it; and finally of the practices of intellectuals in their struggle to impose their way of understanding the world.

The economic and social transformations experienced by the region from the end of the 19th century, especially the difficulties, tensions and crises which appeared with the start of industrialisation and urbanisation, underlie the growing importance acquired by intellectuals throughout the 20th century. All these processes helped to make the everyday lives of the population more complex; there was thus an increasing need for interpretations capable of explaining life, and the numbers of people devoted to thought grew constantly.

At the end of the 19th century, intellectual labour started to be more than a luxury accessible only to families of the elite and their protégés, as a result of the conjunction of number of factors which would, to a substantial extent, increasingly allow people to earn a living through activities associated with reflection. On the one hand, a market for cultural goods began to form around the ever more abundant newspapers, periodicals and books, leading to a proliferation of linotypists, editors and journalists; and on the other hand, the space available to cultural labours broadened thanks to the constant growth of the state, which translated into an increase in the number of teachers, first in primary and secondary schools and later in the universities.

The maintenance of these conditions over time allowed more and more people to live exclusively from their intellectual labours, and more importantly, allowed thinkers to start to read one another. These are two indispensable conditions for the intellectual community to function as a field, and thus for intellectuals to influence one another, first nationally and then regionally.These processes developed such momentum that by the 1920s what the Chilean philosopher Eduardo Devés calls the first intellectual network in the region was active; and by the middle of the 20th century a second network had formed. The first consisted mainly of philosophers, lawyers and historians, that is, intellectuals of a humanist stamp, whereas the second formed around the so-called social scientists, a group of university teachers and investigators in the economic and social areas, together with professionals, technicians and experts of the state bureaucracy and of multilateral organisations devoted to the same disciplines.[1]

It should be added by way of clarification that it was the problems associated with industrialisation and urbanisation – the "social question" as it was then called in some Latin American countries – that absorbed the attention of the intellectual community at the beginning of the 20th century. In the middle years of the century, because these social and economic phenomena remained obstinately present, the interests of thinkers were still concentrated on the same issue; by then however, in contrast to the beginning of the century, progress was understood as development. This meant basically that it was no longer simply a question of enjoying a better life, but of achieving the same levels of well-being enjoyed by developed countries. And of course, because the developed countries were the most industrialised countries, development necessarily implied strengthening industrialisation. This in turn meant, in broad terms, extending the influence of the monetary economy by expanding labour relations mediated by money.

Those most interested in propagating the idea of development, as the Colombian anthropologist Arturo Escobar explains, were the dominant sectors of those countries which called themselves developed, in other words the victors of the Second World War.[2] Their interest was born of their need to promote functional discourses supporting the constant expansion of their economic model, and at the same time to spread ideas capable of neutralising currents of thought which were starting to appear in the colonies of European countries – including those recently emancipated – which tended to point to them as the source of all evil, as examples not to be imitated, or even as enemies. One such current was being promoted in the Caribbean by two Martinicans, Aimé Césaire and Frantz Fanon: decolonisation.[3]

It may be added that the political elites of Latin American countries not only rapidly adopted the idea of development but also used all the resources within their grasp to spread it. This enthusiastic reception is

explained by the fact that internal problems were reaching huge proportions. As they threatened to spiral out of control, they encouraged ideas which pointed to the dominant the sectors as ineffectual or blasé. This is why it has become usual, since that time, to hear opinions which label Latin American societies as deficient, limited and/or underdeveloped.

The main people responsible for bolstering this type of argument, inevitably, were the social scientists: first the experts in the recently opened multilateral agencies and then state professionals and technicians. They generally carried out this task with great vigour, not only because they saw themselves as being charged with a noble mission – to abolish poverty – but also because they were very well paid, especially considering the low average level of salaries across the region. To facilitate the spread of the idea of development, these intellectuals tended to stress the aspects which their hearers might consider attractive. Thus, when speaking to people in poor countries, they presented it as the path to escape from poverty and an effective strategy for maintaining order. On the other hand, if the audience consisted of people from rich countries, they were told that it was the way to go on expanding their businesses and the only guarantee of world peace.

Among the examples that these specialists generally cited to support the effectiveness of development were the good results achieved by Soviet planning during the worldwide economic crash of 1929, and the successful reconstruction of Western Europe after the Second World War. To make their arguments more attractive, the developmentalists claimed to have identified the elements which would enable poor countries to travel the same road followed by rich ones to reach their position; going further, they claimed that – with proper planning – poor countries could advance more rapidly and even skip a few steps.

But the social scientists were not only responsible for spreading word of the bounties of development, they were also responsible for putting their discourse into practice; and this led them to try to determine the basic factors which, in their judgement, would enable poor countries to reach this happy haven. The list of tangible factors that they identified usually included natural resources, work force and capital, while the intangibles included education and technological knowledge. It must be added that, before long, the discourses of these intellectuals started to become omni-comprehensive, meaning that all the spheres of reality started to come under their scrutiny, especially all that were quantifiable.

Developmentalist thought was therefore the set of ideas generated around the formulae to apply, the elements to conjugate and the measures to implement in order to achieve development. The diagnosis peddled by most developmentalists, which even impregnated the common sense of a large part of the region's population, was that the obstacles that underdeveloped societies had to overcome were poverty and ignorance. Their proposals thus agreed that economic growth had to be fomented

by industrialisation, and that their culture had to be modernised by the introduction of the technical knowledge that had proved effective in developed societies. These precepts accentuated the stigmas which had existed since colonial times about traditional knowledge and its bearers.

Currents of Thought in the Struggle for Development

The Economic Commission for Latin America and the Caribbean (ECLAC) was founded in 1948 under the aegis of the recently founded United Nations Organisation. Its purpose was to serve as the technical, theoretical and institutional counterpart of Latin American states in development-related matters. In 1950, coinciding with the appointment of the Argentinian economist Raúl Prebisch to the Executive Secretariat of the Commission, the reputation of the institution began to grow rapidly, and with it the influence of its theses and proposals. Such was the prestige of its postulates that by the end of the 1950s, it was closely watched by the majority of the region's countries, regardless of their size. Even the United States recognised this institution, making it the technical voice of Latin America in the creation of the Alliance for Progress, the principal development strategy of the USA for the region in these years.

The basis for the diagnosis defended by ECLAC included the understanding that, in the absence of forces in any other direction, underdeveloped countries would have to work ever harder to maintain the same levels of well-being. These, it may be remarked, were considered to be unsatisfactory. This analysis was based on the understanding that trade between economies, preferably between exporters of manufactured products (and therefore importers of raw materials) and exporters of raw materials (importers of manufactured goods) – centre and periphery in the nomenclature of the time – would be increasingly unfavourable to the latter.

Although the proposals which grew out of these analyses varied, the idea that industrialisation should be promoted through import substitution had the greatest repercussions. This strategy prescribed a series of economic measures to enable Latin American societies to produce those goods which they had previously imported.

It must be added that the reflective efforts of ECLAC were seconded by the principal regional study centres and by the social sciences schools of some of the best-known universities in the region. The former included the Latin American Social Science Research Centre, created in Rio de Janeiro in 1957, and the Latin American Faculty of Social Sciences, founded in Santiago, Chile, in 1958. Among the latter were the social sciences schools of the University of Chile, the University of São Paulo, the University of Buenos Aires and the National Autonomous University of Mexico.[4] Each of these institutions proposed improvements, corrections and counterpoints to the understandings of development which, as

they were put into practice without achieving the desired effect, called for increasingly detailed analyses until they gave rise, in the mid-1960s, to the theory of dependence.

It must be stressed that the theory of dependence, despite its name, was more a set of reflections on a common problem, the persistence of underdevelopment, than a theory as such. Its cultivators, who came from different disciplines and with varying points of view, were united basically in the appreciation that after several decades of conscious industrialisation, the long-awaited economic growth had not managed to solve the problems of every kind which harassed the region's countries; on the contrary, these had grown more acute, along with the inequalities in the distribution of wealth. Who was responsible for the persistent backwardness of the region? Had underdevelopment developed? Was underdevelopment a stage prior to development, or a consequence of the development of others? These were some of the questions which fuelled the reflections of the intellectuals identified with this theory.

In the few years during which the theory of dependence offered serious competition to hegemonic viewpoints, roughly between 1965 and 1975, all its exponents appeared to agree that underdevelopment was due to the lack of economic control in peripheral countries. Because of the upheavals which shook the region during these years, this viewpoint could only be translated into concrete proposals, and even then with important provisos, in the Cuban revolutionary process. Nevertheless, it must be said that the promoters of the theory tended to agree that, rather than promoting any initiative in isolation, structural modifications would have to be implemented to make economic independence possible. This is made clear in the book published in 1969 by two sociologists, the Brazilian Fernando Henrique Cardoso and the Chilean Enzo Faletto, *Dependence and development in Latin America*. In this work, considered a key study of the subject, they analyse the reasons why some societies achieve development:

> What must be stressed is that the political conditions which allowed development and independence to be attained simultaneously, implied – in different ways of course – development based principally on mobilising the social and economic resources and the technological/organisational creativity found within the nation. Furthermore, this process assumed the existence a period of relative economic isolation due to partial closure of the market (as occurred in the USSR and China), restraining pressures to expand the consumption of goods and services characteristic of mass industrial societies. And it generally required the extension of state control of the productive system, and the direction of new investments towards the sectors considered strategic for national development, such as infrastructure or industries which absorb advanced technological knowledge, and

> those connected with national defence. All this implies a consistent reordering of the social system, a relatively authoritarian discipline (even in the case of Japan, which maintained a capitalist regime) and a revolution in national objectives and educational priorities.[5]

But development was not just pursued in the economic field. Its cultural dimension was also being evaluated from many angles, all starting from the basis that the transformations required could not be achieved with the knowledge available at the time, but by changing, modernising or developing that knowledge. Thus while the official ideas of the *oficialistas*, in harmony with those defended by ECLAC, found their cultural counterpart in the perspectives which proposed to adapt people to prevailing economic strategies, the ideas of the theorists of dependence – *dependentistas* – matched those who saw the need to create awareness on the urgency of fomenting structural changes. And while the *oficialistas* went out of their way to undertake policies to eliminate ignorance and backwardness, the *dependentistas* and their supporters concentrated their efforts on creating the subjective conditions which would smooth the way for more profound changes, meaning liberation. Only when they had been liberated, they seemed to agree, could they think about development, not before.

Among the currents of cultural thought shared by *oficialista* precepts was the theory of human capital, championed by the US economist Theodore Schultz;[6] whereas one of the currents which reached the highest degree of systematisation and influence among *dependentista* postulates was liberation theology. The theory of human capital, which has maintained intellectual predominance ever since, has been well analysed by many sources. Analysis of liberation theology, on the other hand, as it was always in a subordinate position, presents more difficulties. It is therefore appropriate to provide some additional explanation here.

Liberation theology took shape in the 1960s as a result of the enthusiasm of some Latin American priests interested in getting the Church to adopt a position on the liberation processes occurring throughout the continent. Its promoters understood the basic truth that the struggle was in full swing in Latin America, and that the Church must establish alliances with popular sectors if it was not to find itself in the opposing camp by default. Christians who shared these perceptions, among them those who gave life to the thousands of basic communities scattered across the whole continent (in Brazil alone there were around 80,000 of these organisations at the end of the 1970s), understood that it was the prevailing model, through the constrictions that it imposed and the diseases that it countenanced, that held the popular sectors of society captive, and therefore that the time had come to break the silence of complicity maintained by the Church. This reasoning led many believers to the understanding that poverty was as much a structural problem as a personal failing.

It may be noted that liberation theology also shared many postulates with other anti-hegemonic currents of thought, the same perspectives that the creators of the concept of development were trying to counteract. For this reason, the theologists of liberation – like the decolonisers and the *dependentistas* – aimed to contribute to a total break with the ruling system. Only in this way, they maintained, could this new society come about in which there would be neither colonists nor colonisers, neither oppressors nor oppressed. The words of the Peruvian theologist Gustavo Gutiérrez, first published in 1971, clearly express this understanding:

> The failure of reformist efforts has accentuated this attitude. Today, the more alert groups – in which what we have called a new conscience of the Latin American reality is becoming established – believe that real development can only come to Latin America through liberation from the domination exercised by the big capitalists, and especially by the hegemonic nation: The United States of North America. This implies, furthermore, confrontation with their natural allies: the dominant groups in each country. It is becoming increasingly evident that the Latin American peoples can only escape from their situation through a profound transformation, a social revolution which can wreak a radical qualitative change in the conditions under which they currently live. The oppressed sectors in each country are becoming aware – slowly it is true – of their class interests and of the painful road to be trodden to break down the current state of affairs; and – even more slowly – of what the construction of a new society implies.[7]

As expressed in these words, many liberation thinkers – theologists, philosophers, educators and others – understood that what needed to be done on the cultural plane was to raise awareness. It was essential to expose the contradictions and injustices suffered by the marginalised, the oppressed and the disinherited so that they would feel driven to join the struggle. If they overcame, everyone would overcome. If they failed, everyone would fail. There was no room for fence-sitters. Do we want progress? Yes. Do we want development? Yes. But first of all – these thinkers proposed – we must win liberation.

Struggles for Hegemony on the Intellectual Plane

While there was agreement between all the principal view-points proposed to guide the destiny of Latin America that development must be fomented, there was no agreement on the fundamental aspect of how this was to be done. While some defended continuity, perfectibility and/or reform, others promoted a radical break, structural change and/or revolution. Such dissimilar paths, combined with the then prevailing certainty that whoever emerged victor would leave no room

for back-tracking, meant that the exponents defended their respective viewpoints with the passion born of conviction that winning or losing in the struggle of ideas was of critical importance. In other words, those who entered the intellectual battle-ground did so to win, to impose their own terms, and not to promote mutual understanding or to keep discussion open indefinitely.

This explains why one of the most common intellectual practices of these years was to use a manner of writing which presented neither openings nor vacillations, which transmitted the conviction that the writer's position had no worthy opponents and which showed that it was the only correct viewpoint. Thus, one of the few characteristics shared by the contending positions, apart, of course, from faith in development, was that they saw nothing positive in their opponents. This disdain was often so extreme as to consider the other side to be part of the problem. It was therefore unusual for intellectuals to discuss the dissenting ideas of a contemporary, even to disprove them. When this did occur, when other thinkers' ideas were recovered from the darkness, it was often only to caricature, misrepresent or ridicule them. Thus, while those on one side tended to disqualify their opponents by describing them as mercenaries interested only in personal gain, those opponents in turn called them terrorists who yearned to see the whole continent in flames. These stereotypes were also frequent in artistic productions of these years.

Considering this situation, it may be said that the dispute, on the intellectual plane, had nothing to do with the search for truth or with having more tools to interpret reality as clearly as possible, since none of the different positions doubted what the truth was. It would seem that the aim of each was to impose its own view as the only view possible. This was achieved by the viewpoints which were most effective in making their postulates known – either by publicity, i.e. by the amount of resources that they invested in spreading them, or by their efficiency, i.e. their usefulness in helping people to understand their experiences.

It was basically these conditioners that lay behind the intellectual battles fought to impose the meaning or orientation of the concepts which made up the intellectual arena. These disputes explain, for example, the fact that many of the groups which took up arms during these years – whether coup supporters or guerrilla fighters, of the left or the right – were backed by intellectuals who understood them as liberators, revolutionaries and often democrats. One of the first to perceive this sort of semantic struggle was the Colombian sociologist Orlando Fals Borda, in a book first published in 1968, *The unfinished revolutions of Latin America*, where he says:

> Many words have this iridescent quality, changing colour depending on the angle from which they are observed, especially when they are seen in the light of changing historical circumstances: violence,

> justice, public utility, revolution, heresy, subversion. All are concepts rooted in emotions and beliefs which lead people to choose a definite position. This makes them social values, but they may also be anti-values, depending on which side they favoured during the schism of transition. Each of these concepts contains the responsibility of its contradiction: they are only justified in a certain social context. They may be very well understood according to tradition, but they may also be conceived and justified in relation to objectives set in the future which imply an entirely different course to that anticipated by tradition.[8]

Among the most disputed notions in the intellectual field of these decades were the ideas of "nation" and "revolution". In the name of the nation the most daring plans were hatched and the most prolonged privations justified. It goes without saying that all the groups that directed or aspired to govern society, regardless of their alliances and interests, were moved by the desire to safeguard the nation. The concept of revolution was also extensively disputed, especially after the triumph of the Cuban rebels in 1959. Innumerable debates were held to try to define its precise meaning, determine how desirable it was and establish the best strategies to advance or contain it, depending on the debaters' position.

As the struggles for society-wide hegemony intensified, many discussions passed from conceptual argument to a fight to try to determine what role intellectuals should play in the processes that were occurring. While those who defended hegemonic positions did not face serious dilemmas – in that they understood that intellectuals should work to tune the technical instruments which would ensure maximum efficiency in any sphere – those who aspired to seize power debated intensely the most appropriate steps to achieve this object. The process that they followed was more or less as described below.

Up until the 1950s, the role of intellectuals was to make reality intelligible, to provide guidance which would help people to overcome both the constrictions and the problems that they faced. In the following years, many thinkers were pressured to add active participation in revolutionary organisations to these responsibilities. However, their inefficacy in achieving these objects led to the perception that this combination was insufficient, above all by those more deeply involved in political processes. This perception left the door open, as the Argentinian literature specialist Claudia Gilman explained, for another aspect to be brought into the dispute, namely the need for intellectuals to take an active part in some organisation to give revolutionary meaning to their intellectual activities.[9] Only in this way, it was thought, would they be helping to create the conditions necessary for the triumph of the revolution.

In the 1960s, the axis of discussion moved further to the left: no longer was it enough for intellectuals to contribute by their works to

revolutionary purposes, they were required to subordinate their practices to the dictates of revolutionary organisations. Faced with these requirements, some left-leaning intellectuals declared their independence. It was in this context that those who supported the armed struggle understood that such a declaration of the individual's position served to distinguish bourgeois intellectuals from revolutionaries, while those who defended pacifist positions, like the Peruvian author Mario Vargas Llosa, considered that the exercise was useful to make clear who were the critical intellectuals and who had knuckled under to revolutionary organisations.[10]

Despite the break outlined above, discussion on the role of intellectuals in revolutionary processes continued to develop, and at the end of the 1960s, coinciding with the failure of the guerrilla campaign led by Ernesto Guevara in the heart of South America, some of those who considered themselves revolutionaries started to question the usefulness of intellectual labour. This explains why many militants and guerrilla fighters started to incubate the idea that while they risked their lives for the revolution which would benefit everyone, there was a significant fraction of intellectuals who did nothing but fill their mouths, bellies and pockets with the word 'revolution'. Many who thought in this way agreed with the French philosopher Régis Debray, that in the existing circumstances, in this revolutionised Latin America, there were too many intellectuals. They defended this reasoning with the argument that the road ahead was already clear, all they had to do was to follow it. What was the road? Armed struggle.[11] The analysis of the Brazilian sociologist Marcelo Ridenti of the left in Brazil during the second half of the 1960s and the early 1970s confirms this reading:

> The same aversion to "books", "statues" and "bookshelves", all of which should be pulled down, permeated in various forms the whole of the social movement of 1968, from those who gave life to the counter-culture to committed artists, from hippies to guerrilla fighters. Anti-theorism, the negation of reflection in the name of action, was also strongly marked in urban guerrilla groups. For them, revolutionary political theory was already established, and no time should be wasted on interminable, sterile, bureaucratic theoretical discussions, which simply delayed the immediate execution of revolutionary action.[12]

To complete this approach to the intellectual environment in Latin America in the third quarter of the 20th century, it should be noted that behind all these disputes were not just the arguments for or against: while on one side the dominant sectors in the United States deployed huge efforts to impose their ideas, on the other, the Cuban elites, from 1959 onwards, did everything in their power to the same end. Massive

cultural policies were implemented by both countries, among them the study grants financed by the United States and the literary prizes sponsored by the Cubans. Not surprisingly, each side cast a baleful eye on the other's initiatives, slighting them with statements in which they accused one another of expressions of cultural imperialism, or simply propaganda.

It should be added that these cultural policies were not the only weapons directed against intellectuals. As the different forces which disputed for control of society radicalised their actions, the exercise of violence – in its different manifestations – reached out towards thinkers. Thus, while the aspirants to power concentrated all their energy on the armed struggle, denigrating as we have seen many kinds of intellectual labour, the defenders of established power did not hesitate to exile, torture or murder intellectuals of the other side. This goes to show that, for those who devoted themselves to thought, ignoring the struggles going on for control of society was never an option.

As a result of the succession of defeats inflicted on guerrilla groups throughout Latin America, and the installation of dictatorships in many countries across the region, in other words the political/military conclusion of the struggles for hegemony, by the mid-1970s disputes over the best road to development started to die down. The battle of ideas did not end because one viewpoint defeated the other by argument, but because those who won power by force of arms used fear, repression and censorship to silence dissent. From that time on, neoliberalism – and its postulate that economic growth is achieved by market deregulation and not state-driven industrialisation – became installed, more or less effectively, as the only way of thinking.

While the fight for hegemony was on, no-one had time to think about the possibility of losing. Every intellectual knew that truth was on his side, and that what he had to do was to fight until victory was attained. And although they all knew that some might fall in combat, nobody doubted that the final victory would be won. Thus, when the all-or-nothing struggle reached its end, the surprise of the intellectuals on the losing side was complete. Some, very few, opted to remain in their trenches, excluded from the institutional circuit. Others decided to leave their links with concrete political struggles in abeyance while they tried to understand what had happened. And yet others, probably the majority, chose to support what they considered the best and most human version of capitalism.

So the concept of development continued to configure the intellectual environment surrounding debate on the strategies by which it was to be achieved. While some positions trusted in reform, such as those associated with ECLAC or the theory of human capital, others defended the revolution, like the thinkers of the theory of dependence or liberation theology. This dichotomy laid the foundations for the intellectual battles

of the coming years, battles which sent many thinkers into exile and which underlie many works of inestimable value. Although today intellectuals continue to feel the structuring influence of the idea of development, the incessant specialisation promoted by neoliberalism only serves to discourage debate, reducing the possibility of coordinated thinking about the subject. The reader will appreciate that if the decades studied in this chapter did not provide the best setting for intellectual dialogue, their inheritance in this respect does not appear much more promising.

Notes

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3 The Golden Years of Education in Latin America, 1950–1980*

The Explosive Increase in Education Cover

To understand the large-scale processes occurring in education in Latin America in the mid-20th century, the first aspect to consider is that the region was experiencing an unprecedented economic boom, accelerated urbanisation and enormous demographic growth; and the second is that all this occurred in the midst of severe social tensions, deep economic constrictions for the majority of the population and violent political divisions within our societies. In this disparate scenario, a large portion of the actors in society, and most especially social scientists, devoted themselves to the task of proposing strategies capable of extending the economic successes and containing the serious social problems. This was what was understood in the language of the time by "development". It may be added that all the formulae that were tried with the aim of fomenting development attributed an important role to education, and that most of them agreed that it was essential to increase cover by reforming the education system. This chapter discusses how these purposes were gradually realised, the forces which came into play and the difficulties encountered.

Although education cover had been increasing gradually in Latin America since the end of the 19th century, it was only in the mid-20th century that this trend intensified at a dizzying rate, which it sustained until the external debt crisis of the 1980s. To obtain a clear idea of this marked expansion in education, one has only to look at the huge increase in public funds assigned to teaching, and the strong rise in primary school matriculations. For example, while national budgets for the primary level – which accounted for 80% of all the resources invested in education – doubled between 1960 and 1968, primary school matriculations increased at twice the rate of demographic growth. These data are consistent with the fact that primary school matriculation rose from below 60% of the school age population in 1960 to over 80% by 1985.[1]

Why did this strong increase in matriculations occur? Why were more resources invested in education? Was it due, as the Chilean-Australian educator Robert Austin suggests, to the pressure applied by the popular

sectors through their various forms of struggle? Or was it, as the Colombian educator Alberto Martínez Boom proposes, a ruse by the dominant sectors to make it easier to control the ever more numerous popular sectors?[2]

No doubt both interpretations play a part in explaining the spectacular increase in education cover; just as many indications show that the state has never conceded social benefits without a struggle, many also show that education was indeed one of the mechanisms used by the elites to consolidate a cultural platform which functioned in their interests. Nevertheless, it cannot be denied that some indications show quite the opposite: that the popular sectors did not necessarily attach much importance to education, so did not always apply pressure to obtain it; and that the state did not invariably promote it as a way of controlling the popular sectors, but as a mechanism for giving people tools which would benefit the community as a whole. To understand these apparent contradictions, and most importantly to understand the reasons behind the rapid expansion of the education system, this section will examine the variations in the value attached to education by both the popular and the dominant sectors of Latin America.

This introduction to popular perceptions of education will be based on two appreciations offered by some of those who claimed at the time to be their spokesmen. While the Nicaraguan poet Ernesto Cardenal affirmed that a Spanish missionary to the country, Gaspar García Laviana, had desisted from setting up schools for the rural population because experience had taught him that nobody wanted to learn, Cuban leader Fidel Castro maintained that during the revolutionary struggle he had heard at first hand that the peasant population desired literacy above any other benefit.[3]

How can such opposing opinions exist on the same subject? Was one or the other seeking to misinform us? No. Although at first glance it might appear obvious, it must be stated that those who made up the popular sectors did not have a homogeneous view of education. Their views varied widely under the influence of an infinity of factors, one of which – their appreciation of its usefulness – must be assumed to be cardinal. If they did not see that education would be of use to them in the short or medium term, which was probably the case of all those who worked in traditional systems – including the peasants whom Gaspar García Laviana talked to – they not only ignored it, but in some cases even despised it. Examples of this can be found going right back to the arrival of Europeans in the continent.[4] If, on the other hand, they understood that education could offer them something useful, even in the long term, like those who had to alter their way of working after being displaced by powerful landowners or because they found themselves in the middle of a battlefield – the kind that Fidel Castro knew – they started to recognise its value, and consequently to demand it. This also explains

why, in both revolutionary Cuba and revolutionary Nicaragua, one of the first measures implemented by the insurgents after their triumph in the war of liberation was to set up literacy campaigns which resonated strongly in the population.

In other words, as industrial logic began to be introduced into farm production, with all the economic, social and cultural transformations that this implied, the rural population found it increasingly difficult to maintain their traditional forms of subsistence, making the possibility of migrating to the towns more attractive. In this scenario, attitudes to education became increasingly favourable, since the school, with good reason, was seen as providing cultural elements which were essential for surviving in the new context. "There they learn the language that people talk in the city", the indigenous people must have thought; "There they get some of the tools that allow them to live better in the city, like reading and writing and basic mathematics", the peasants must have understood. This explains why, once they had migrated and were already living in the city, practically all the popular sectors set a positive value on education, demanding it on a wide range of grounds – from the understanding that children were sure of a meal at school to an appreciation that there they would acquire tools which would translate into better material conditions in the future. All these arguments are contained in analyses of the usefulness of school for the rural population produced by a multidisciplinary team coordinated by one of the principal experts on Latin American education in those years, the Uruguayan sociologist Germán Rama:

> The fact that children attended school, and especially if they completed their schooling, is a source of prestige in the family, in the community, and for the family within the community. Attending school is a form of integration into the urban world and the nation, even if it is segmented, limited and partial. Finally, the children always learn something, even if its immediate usefulness is not very clearly apparent. It has few applications in farm work, either on the family property or that of other small producers. It is more useful for working in capitalist companies, where there are more requirements such as signing receipts or vouchers, reading the labels indicating the contents of things used at work, speaking the lingua franca, etc. It has still more applications in sales activities, either through intermediaries or directly in the local markets. And finally there is its deferred usefulness, for the ever-present possibility of temporary or permanent migration.[5]

Turning to the dominant sectors, some remarks can be made on the value that they attached to education, especially as it was they who, through their actions in the State, made the expansion of the school

system possible. To the old Enlightenment ideas – that education of the popular sectors was the master key which would open the door to the cultural treasures of humanity, and that it would provide them with valuable skills to fully exercise their sovereignty – in these years the dominant sectors in Latin America added the economic reasoning that education would give workers the necessary knowledge to participate more efficiently in the prevailing productive system. This notion, which can also be read as the understanding that education would enable workers to produce more and better-quality goods, was at the root of the practice known since then, indistinctly, as formation of human resources or formation of human capital.

Although different ways of expressing these understandings existed within the dominant sectors, they all agreed in linking education closely to what was then understood by development. Thus while one segment of the dominant sectors understood that educating the popular sectors was necessary in order to do away with the backwardness and ignorance which hindered the development that they sought, another segment understood that it was necessary to educate the people's consciousness, to make them aware, in order to put into effect the structural transformations which would permit development. It can be said then, that despite the discrepancies which existed on the importance of education in fostering development, it was difficult to find anyone who questioned the idea that development was desirable, and likewise to meet anyone who doubted the importance of education.

All these factors lead us to the conclusion, suggested by the Argentinian sociologist Tomás Vasconi, that the increase in school matriculation was intimately bound up with the importance that education acquired for the population as a whole.[6] This importance, it must be added, was appreciated in different ways depending on the particular combination of judgements and reasons held by the actors in society, which in turn reflected the demands imposed by the expansion of the prevailing modes of production and settlement.

Reforming Education to Match Development

Another of the characteristic notes of Latin American education in the mid-20th century was the implementation of ambitious plans to give expression to this desire, and this need, to expand the education system. A historical view, as given by the Costa Rican educator Gabriela Ossenbach, shows that many of those who concerned themselves with public questions in the mid-20th century considered that the growth rate of the educational system up to that point – the same system that had started to take shape the day after the triumphs of the *independentistas* and had been accelerating since the last decades of the 19th century – was not fast enough, especially considering the potential numbers of pupils.[7]

Taken to extremes, this reasoning demanded reform of the region's education systems.

Every reform during these years, regardless of its magnitude and the political colour of the government by which it was promoted, aspired to great objectives like deepening democracy or democratising education. This homogeneity resulted in large measure from the fact that the principal institution which encouraged these initiatives, the recently founded United Nations Educational, Scientific and Cultural Organization (UNESCO), maintained an unvarying position. Among the educational objectives transferred to Latin American countries by this organisation were: to expand primary education as widely as possible; to achieve literacy in the whole adult population; to ensure equality of educational opportunities and to increase matriculation in secondary and higher education.

How UNESCO managed to influence educational reforms can be explained from at least two angles: one, because it had teams of highly recognised specialists who generated equally prestigious inputs to enable governmental authorities to take decisions on the subject; and two, because all the external funding provided for education from official sources – which involved large sums in those years (readers will recall, for example, how substantial were the capitals moved by the Alliance for Progress in the 1960s) – required the consent of either UNESCO or one of the other institutions which proclaimed similar objectives, such as the Organisation of American States or the Economic Commission for Latin America and the Caribbean.

If the homogeneity of the reforms can be understood thanks to the above information, the implementation of one reform after another, a process which has continued down to the present, is understood not only as a result of the persistence of the objective originally proposed, that of expanding matriculation, but also as a consequence of the necessary adaptations imposed when an incoming government set itself new horizons as a result of its attempts to satisfy the simultaneous demands placed on the education system by different actors, and as expressions of the search for formulae which could resolve the problems which continued to appear as the different strategies were implemented.

Changes of government often required significant intervention in the education system, as each represented different visions of how to achieve development, and therefore of the role of education in this process. As Philip Coombs, the American director of UNESCO's International Institute for Educational Planning, said, to contribute effectively to development people had to be educated with a view to their future employment.[8] And as each government had its own particular diagnoses of the gap between the situation of the moment and the desired target, and of the means needed to achieve the latter, each promoted more or less profound modifications in the education system. To appreciate how

these conceptions permeated educational discourse one has but to read the reflections of the well-known Peruvian philosopher Augusto Salazar Bondy, who wrote in 1957 on the subject of the challenges that he considered that his country should take up:

> There is a special need to meditate on the principles and directives that control the whole Peruvian education system, and on the concrete ways and practical means of teaching in schools the knowledge that the country needs. But at the same time we must analyse the resources currently available to us, the possibility that they may increase, and how to make best use of them; and carry out a rigorous, objective selection of the goals we propose to achieve, breaking them down by stages and by areas of application. In other words, we must plan Peruvian education. Only in this way can we really comply with the obligation to educate all Peruvians comprehensively, and not, as has been the case to date, only a privileged minority.[9]

Education systems were also reformed to try to respond appropriately to the multiple demands made by different social sectors on the school system. This is always a difficult equation to solve, in that all the actors, whether or not their expectations are satisfied by their experiences, interests and possibilities, aspire to the best possible education. Thus, although the popular sectors were fighting for access to the school system, many of them dreamt of sending their children to university. The same ideal was shared by the increasingly numerous middle sectors of society, who were pressing for better quality secondary schools; and finally, by the dominant sectors, many of whom already enjoyed a university education but who also demanded improvements in the quality of the universities.

The third justification on which the reforms were based was the need to think of ways of solving the problems which arose from the mismatches caused by abrupt changes applied in the education system – as the Argentinian educator Juan Carlos Tedesco remarked in retrospect.[10] These consisted in making educational services more attractive in order to reduce the high levels of truancy, increase the retention of pupils in the system and reduce the large numbers who had to repeat grades. These goals were always pursued in a scenario in which economic resources were tight or frankly insufficient.

All these currents of reasoning, combined, were at the root of the two types of reform attempted in the region during the third quarter of the 20th century: structural reform, which aspired to effect profound transformations of the education system in order to help to put an end to economic inequalities; and general reforms, which sought to improve the internal efficiency of the system. The latter were more frequent, since

structural changes, like those implemented in revolutionary Cuba and projected in Salvador Allende's Chile, had to go hand in hand with basic economic changes which, it goes without saying, were trumpeted more often than they were put into practice.

Regardless of the character assumed by the reforms, everyone understood that the elements of the school universe where intervention was feasible were those that could be measured, quantified and/or controlled. Thus, in the final analysis, the areas where reform was feasible were all those involved in school infrastructure, including of course the contents taught.

One of the most original chapters in the reforms of these years was the implementation of experiments in informal education, the label attached to those instances which, while not forming part of the school system, had educational pretensions. These initiatives tended to be concentrated on literacy training for adults – although they were also often used to support the implementation of new public policies, like the agrarian reforms, in which they were used to socialise the technical contents of these policies; and they were generally implemented in rural contexts, although many urban schools started offering evening classes to teach adults their letters.

Informal education presented two particularly notable characteristics: its experiments were not concentrated exclusively on education, since they were also used to foment social participation, promote leadership and sensitise people to particular problems; and practically all the experiments included previous studies involving the future beneficiaries in order to identify their needs and expectations in the processes undertaken.

Although informal education became important in the middle of the 20th century, it also achieved special protagonism in the 1980s. This was because when the debts of Latin American societies drove the ruling elites to cut social cost items in national budgets, many international cooperation organisations from rich countries started to provide copious funding for initiatives of this kind. This movement reached such proportions that the non-governmental organisations which implemented the programmes became almost para-states, a phenomenon that can still be observed today in some of the poorer countries of the region.

The mere presence of these informal education initiatives shows that the task of extending cover to the desired levels was no simple matter. It was as difficult to find a consistent formulation of development as it was complicated to adapt the school system to the formulation proposed. Likewise, it was as difficult to satisfy simultaneously the educational interests that each sector of society threw into the ring as it was complicated to resolve the new problems that appeared with each step forward. These difficulties, and above all the questioning of the strategies implemented to overcome them, are discussed in the next section.

Over the Crest: Criticisms of the School System

The golden years of education in Latin America, when its importance was unquestioned by a large part of the population, when school matriculation expanded exponentially and there was a succession of reforms to support that expansion, were also controversial times in which various specialists, and a significant part of the middle sectors of society, started to question many aspects of the school system. Of the many criticisms which appeared, three tended to recur: that the expansion of matriculations was not favouring all sectors of society; that the beneficiaries of a very large part of public funding were people who needed it least; and that school education was becoming an increasingly heavy burden on states.

In respect of the first criticism it was observed that, during these years, the expansion of matriculations followed a concentric pattern – in other words it started in the power centres and then spread, as far as this was possible, to marginal areas. The first beneficiaries were therefore national capitals, followed by other big cities and adjacent areas, and at the end of the queue were the rural sectors. Although the demand for education was stronger in urban agglomerations, and although the installation of schools was more economically viable in more densely populated settlements, not a few questioned this logic, principally because it did not offer the same educational possibilities to the whole school-age population.

The second criticism was that the provision of education was selective, since although states set out to offer equivalent educational services to the whole population, in practice they provided more and better education to those who had more resources: the middle and dominant sectors. This in turn explains why the installations of state schools were more precarious when they served children in popular sectors, why illiteracy today is still much higher in the country than in the cities (and higher still among those who, like the indigenous peoples, had fewer links with the dominant sectors), and why matriculations in primary schools showed the highest growth in absolute but not in proportional terms. This is what appears from the figures for the increase in school matriculations in these years in Latin America, since while the numbers of pupils matriculated in secondary schools and universities, specifically serving the middle and dominant sectors, increased by 178% and 182%, respectively, the increase in primary schools was only 65%.[11]

The third criticism, referring to the fact that education was becoming economically non-viable, was based on the fact that states were having to increase the resources devoted to education, year after year, to attain the same standards of cover and quality. This dynamic resulted from the constant growth in the number of pupils entering the systems, and also from the fact that more and more pupils studied for longer. The clear conclusion was that the day was not far off when the system would be impossible to finance.

Among the most active critics of education, based on these and other arguments, were the young professionals who gave life to certain experiments known as "popular education". This intellectual current, the first exponents of which appeared at the turn of the 20th century, received a new impulse in the middle of the century due to two almost simultaneous processes. On the one hand, many governments concerned with social justice started to a promote experiments in informal education which, in some cases, could be read as popular education. On the other, as conservative authoritarian governments multiplied, their opponents, armed with liberation ideologies, tended to appropriate these experiments in informal education and value them as practices of resistance – understanding them as popular education.

This familiarity between informal and popular education, as the Argentinian educator Adriana Puiggrós well notes, makes it easy to confuse them.[12] And their diagnoses and proposals did indeed – and still do – contain many shared aspects. Nevertheless, it must be remarked that there was one fundamental difference: while experiments in informal education were based on the need to extend education cover by alternative means to the school system, initiatives in popular education were proposed for application in the popular sectors. In other words, while popular education was primarily intended for the popular sectors, informal education basically followed state guidelines. It must be said, however, that there were moments when some states, controlled by actors with an affinity for the popular sectors, developed initiatives in informal education which can simultaneously be understood as popular education.

In line with the above criticisms, experiments in popular education were set up to cover some of the gaps in education cover, to counter the poor quality of the educational initiatives intended for the popular sectors and/or to neutralise the impediments which prevented these initiatives from prospering in the system. One of the most important of these impediments was the fact that many pupils from the popular sectors were forced to abandon their studies, either because of the precarious education they received or because they had to work to help support their families. The same barriers still exist today, although expressed in different ways. The Argentinian educator Pablo Gentili means much the same when he says that the increase in education cover recorded in recent decades must be treated with caution, since while in the past the popular sectors were barred from entering the system, now they can enter but into a watered-down version of the system. To quote:

> Throughout history, and with very few exceptions (such as in Cuba after the 1960s), Latin American and Caribbean countries developed their educational systems in the midst of a process of profound

> segmentation, creating differentiated institutional networks in terms of both the material conditions provided to each segment of society and the educational opportunities offered. This segmentation casts doubt on the very notion of a "national education system" in many of the region's countries. Strictly speaking, insofar as they tended to democratise the opportunities for access, school systems became more segmented, defining a series of such widely divergent "circuits" that it was impossible to compare the real educational experiences of those who studied in them. It is obvious that in Latin America, opportunities for access to the "other circuit" are not defined by the talent of the pupils, or by the free choice of the parents, but by standard of living, the material resources of the family and the many effective forms of segregation reproduced in society. In other words by class and by sexual, ethnic or racial condition.[13]

Another sharp critic of the education system was the university student body. These young people breathed fresh life into the doubts spread across the continent by the students of the National University of Córdoba several decades before, and like them criticised the universities for retreating into their ivory towers and turning their backs on the difficulties of all kinds affecting their countries. The "university reform movement", which burst upon Bogota, Santiago de Chile and other cities across the region in the middle of the 20th century, took concrete form in voluntary work experiences, many of which were understood as popular education, and in public manifestations of discontent, either with educational problems similar to those described or with the abuses committed by authoritarian governments – which they denounced.

In their own minds, these students saw themselves as agents of social transformation, heroes of the struggle and bearers of the imperative mission to liberate society – in the spirit of a Brazilian song of the period, *Pra não dizer que não falei das flores* by Geraldo Vandré; however, some independent analysts have since understood them as representatives of the middle sectors who, feeling that they had no place in the society of the time, rebelled to carve out a niche for themselves.

Whatever the motives that drove university students to voice their dissent, it should be noted that massive support for some of their initiatives was facilitated by the fact that these young people were immersed in closed spaces which contributed to the rapid socialisation of their demands, and that they enjoyed wide press coverage. Nonetheless, it must be added that none of this saved them from the heavy-handed repression unleashed on them by governments which saw them as agitators, rebels and/or destabilising agents. The hundreds of Brazilian university students who ended up in gaol in those years, and the thousands of Mexican students who watched as hundreds of their comrades were shot down by the armed forces shortly before the 1968 Olympic Games can bear witness to that.

In the end, all this repressive force succeeded in its purpose of forcing the student movements onto the back foot, coinciding with a sustained reduction in funding for education in national budgets. Thus, education ceased to be, *de facto*, a priority for the elites and their development strategies. This should not be understood solely as a consequence of the fact that the dominant sectors had ceased to believe in the virtues of the education that had caused them such headaches – especially these rebellious university students and young professionals who clamoured for popular education – but also as the result of an extra-regional economic phenomenon which, as so often before, was crippling the economies of Latin America.

From the mid-1970s, all the region's countries were forced to abandon their economic growth strategies based on induced industrialisation – the strategies which required constantly increasing levels of education in their populations – due to the explosive rise in oil prices which led to unsustainable levels of debt in Latin American states. When states could no longer obtain new loans to pay off the old ones, in other words when they became financially insolvent, the segments of the dominant sectors who controlled the country had to look elsewhere to obtain the resources needed to pay what was owed, and opted to sacrifice spending on social policies. One of the first areas to suffer was education. This was how neoliberalism – the doctrine which allows freedom of action to economic agents in the market while restricting state activity in all its areas, including education, as far as possible – started to take a firm hold. From this point on, the guiding questions for public policy in this field would not, as in the past, ask how educational cover could be increased, but what was the minimum that the state could invest to obtain a reasonable education system, or in extreme cases, as the Chilean educator Sebastián Donoso Díaz explains, what was the minimum that the state should invest to ensure maximum profits to educational entrepreneurs.[14]

This marked the end of the many decades in which pedagogical optimism prevailed, the widespread understanding which saw education as the best solution for practically any ill, giving way to educational pessimism, the feeling that the school system had lost its central position in the struggle for development. This transition occurred, among other reasons, because more and more people started to see education as a perverted mechanism which permitted only the reproduction of everything necessary to keep the elites in their place – an interpretation consistent with that popularised by the French intellectuals Louis Althusser, Pierre Bourdieu and Jean Claude Passeron.[15] Another cause of this transition was that many of the defenders of neoliberal ideas started to disseminate the notion that education was irrelevant to better results in terms of economic growth, an assessment more easily read in their practices than in their discourse.

In this scenario, while the intellectuals who clung to the power of the State attempted to expand the educational strategies implemented

in the recent past, adapting to the changes around them without paying much attention to the criticisms that had been raised during this period, the thinkers who refused to obey orders that they considered unjust continued to wonder why school systems did not appear to cooperate with the transformation of our societies to juster embodiments, and what role education could acquire in the resistance/liberation processes promoted by the popular sectors. As we shall see in the following chapters, Iván Illich, Paulo Freire and Ernesto Guevara not only took up the gauntlet of answering these questions, but were among those who most clearly expressed the efforts that were being made in Latin America to explain the role of education in revolutionary struggles.

Notes

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3 See, respectively, Cardenal, E. *La revolución perdida. Memorias 3*, Madrid: Editorial Trotta, 2004, pp. 121 and 122; and Castro, F. *La educación en la revolución*, Mexico City: Ediciones de Cultura Popular, 1980 [1976], pp. 54 and 55.

4 See int. al. Donoso Romo, A. *Educación y nación al sur de la frontera: organizaciones mapuche en el umbral de nuestra contemporaneidad, 1880–1930*, Santiago de Chile: Editorial Pehuén, 2008, pp. 29, 30, 39, 41 and 42.

5 Rama, G. (coord.) *Desarrollo y educación en América Latina y el Caribe, tomo 1*, Buenos Aires: CEPAL/UNESCO/PNUD/Kapelusz, 1987a, p. 243.

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7 Ossenbach, G. Génesis histórica de los sistemas educativos. In: García, J.; Ossenbach, G.; and Valle, J. (eds.) *Cuadernos de educación comparada 3: génesis, estructuras y tendencias de los sistemas educativos iberoamericanos*, Madrid: Organización de Estados Iberoamericanos, 2001, pp. 21, 23, 34 and 39.

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10 Tedesco, J.C. *Educación y justicia social en América Latina*, Buenos Aires: Fondo de Cultura Económica, 2012, p. 59 ff.
11 This trend can be seen, int. al., in Rama, G. (coord.) *Desarrollo y educación en América Latina y el Caribe, Tomo 2*, Buenos Aires: CEPAL/UNESCO/PNUD/Kapelusz, 1987b, pp. 53, 55 and 58.
12 Puiggrós, A. Historia y prospectiva de la educación popular latinoamericana. In: Gadotti, M. e Torres, C.A. (org.) *Educação popular: utopia latinoamericana*, São Paulo: Cortez Editora e Editora da Universidade de São Paulo, 1994, p. 13 ff.
13 Gentili, P. *Desencanto e utopia: a educação no labirinto dos novos tempos*, Petrópolis: Editora Vozes, 2008, p. 35.
14 Donoso Díaz, S. *El derecho a educación en Chile: nueva ciudadanía tras el ocaso neoliberal*, Santiago de Chile: Bravo y Allende Editores, 2013, p. 176 ff.
15 See int. al. Althusser, L. *Aparelhos ideológicos de Estado*, Rio de Janeiro: Graal, 1985 [1970], pp. 59, 69 and 77; and Bourdieu, P. e Passeron, J.C. *A reprodução*, Rio de Janeiro: Francisco Alves Editora, 1982 [1970], p. 218.

Part II

4 Iván Illich, Deschooling and the Cultural Revolution*

Iván Illich in Latin America

At the First National Teaching Congress held in La Paz, Bolivia, in January 1970, Iván Illich told teachers: "I want you to understand me clearly; I am not going to talk about reforming the school system, but about overturning an anachronism".[1] However you look at it, the object of his oratory that day was not simple, especially bearing in mind that he was trying to convince teachers that they should assume the leadership of a cultural revolution which would put an end to the institution to which they had devoted a large part of their lives, and which, undeniably, provided them with their daily bread – compulsory schooling.

It is not hard to deduce that these teachers did not heed the call and that the revolution did not prosper, evidence of the great significance of schooling to this day, not only in Bolivia but also in Latin America. Nevertheless, the ideas of Iván Illich have remained valid in certain intellectual circles as they serve to represent a current of thought that has not been discredited in the battle of ideas, and particularly as they offer many fascinating aspects which – as the German philosopher Eric Fromm noted[2] – makes them impossible to ignore. The enduring relevance of his postulates is demonstrated by all the articles which year after year review his premises in the different ambits that he explored (medicine, theology, education, etc.), and the periodic new editions of his principal books. The most influential of these in Latin America are the collected works published in two volumes by Fondo de Cultura Económica in 2006, under the title *Obras reunidas* [*Collected Works*].

Iván Illich was born in Vienna in 1926. A quarter of a century later, in 1951, he was reborn in Latin America when he started to work in a church in New York attended by large numbers of Puerto Ricans. This sort of 'island of the Third World' marks a turning point in his intellectual career, since it was here that he started to grasp the harsh conditions suffered by the wretched of the earth, and because it was precisely here that he started to soak up the revolutionary spirit that they shared and that permeated all their lives.

Over the following 25 years, Iván Illich plunged deeper and deeper into the human and intellectual geography of Latin America. During this process his thought acquired much of the character and substance for which it became known all round the world. From New York he moved to the Caribbean, in 1956, to take up the post of vice-rector of what is now the Pontifical Catholic University of Puerto Rico. Then, at the beginning of the 1960s, he moved again to Cuernavaca, Mexico, where he created the Intercultural Training Centre, known from 1966 until it closed in 1976 as the Intercultural Documentation Centre, CIDOC. Both in the University and in the Centre, he was anxious to attenuate the harmful effects caused by missionaries from the USA in their work with the population of Latin America. The best way to do this, as he saw it, was to present them with a critical perspective of the implications of their actions in the region, which they were taught while they were learning Spanish.

In 1958, Iván Illich met Everett Reimer, an educator who was visiting San Juan to offer advice on education, and who shortly afterwards joined the team of specialists which gave rise to the Alliance for Progress. The two started a dialogue out of which Iván Illich developed his main theses on education. Their exchanges lasted for more than ten years and drew on contributions from the many individuals who passed through the Centre, principally missionaries and intellectuals. This collective reflection reached its apogee at the end of the 1960s, when Everett Reimer led a seminar in Cuernavaca entitled "Alternatives in education". Various publications resulted from this seminar, including *School is dead,* by Reimer, and *Deschooling society,* by Iván Illich.[3] The essential difference between these twin works was the audience to which they were addressed: while the first presented an exposition which followed traditional academic parameters, the second used a highly provocative style intended to be read outside specialist circles.

Iván Illich, like other original thinkers, developed a single great reflection on education over the course of his life, which he reformulated as the interlocutors whom he addressed varied and as he went on incorporating new material. This explains why he repeats the same ideas in various formats and languages between 1968 and 1974, the most productive period of his thoughts on education. To a certain extent, each new publication was an update of his thinking – or perhaps a sort of thinking aloud with all the virtues and vices implied by such a process. It has been by studying these writings, dialoguing with them, questioning them, that the central nodes of his critique and his own educational proposals have been identified. It has been by placing his production in its context in Latin American history that the reasons have been inferred that led him, in the mid-1970s, to close CIDOC and abandon educational activism. And it has been by understanding his reflection as part of Latin American thought that it has been possible to dimension both

his familiarity with the intellectual traditions of the region and his most substantial contributions.

To communicate all these findings, the present chapter is organised in three sections: one exposing the heart of his criticism of education, a second showing his principal proposals and a third to close the chapter in which are noted his ways of understanding the links between schooling and social transformation.

Deschooling Society as a Revolutionary Imperative

In the late 1960s and early 1970s, education in Latin America was at the centre of the principal political and intellectual debates as never before. This phenomenon was imposed by a set of factors which included the spectacular growth recorded in all the indices associated with education and the various protests led by secondary school pupils and university students in countries like Argentina, Mexico and Brazil. Before discussing in detail the ideology that Iván Illich brought to these debates, and with the object of getting the most out of this examination of his ideas, we will make a few observations which will, we trust, mitigate the almost instinctive rejection that first acquaintance with his proposals tends to produce in readers.

The first thing to clarify is that for Iván Illich the words 'school' and 'education' were not synonymous – and no more were 'school' and 'compulsory school'. It is vital to bear these distinctions in mind, as a superficial reading may invite the reader to understand him as a man who wanted to do away with education, when in fact he was primarily concerned to analyse schools, and through them the school system. To be very explicit on this point, he did not seek to put an end to education, nor to schooling, but merely to abolish compulsory school attendance.

Obviously, given the outlandishness of these proposals, it is not surprising that they raised a certain degree of unease and even rejection. He himself foresaw this resistance, for he understood that the first thing that schooling did, before it taught anything, was to fuse the notions of education and school in the students' minds to the point of transforming them into a single concept. Indeed, he went further, believing that the principal mission of any school, regardless of its political orientation, its economic resources, the characteristics of its educators and/or its teaching methods, was precisely to generate this homology; because it was this confusion that allowed schools to install in people's minds at a fundamental level the idea that the only legitimate education was that provided by schools.

This synonymy between school and education was, to his mind, the hidden curriculum of schools, in other words the undeclared but central content that they taught. In contrast to the notion of hidden curriculum popularised in these same years by the French sociologist Pierre

Bourdieu, who claimed that what was taught in schools were scraps of the culture of the dominant sectors in a system invariably beneficial to the latter, Iván Illich considered that school basically sought to legitimise itself as the only institution responsible for delivering knowledge.

Beyond all these conceptual differences, it is important to denaturalise this false identity between school and education because only then can we question whether school is the best alternative for our education. This in turn was a necessary previous step to postulating that school is not good or bad in itself, but that the harmful aspect is to make it compulsory. How could he arrive at such conclusions? Why – when intellectuals across Latin America tended to think that obtaining compulsory schooling had been a triumph of the popular sectors – should he contradict that idea? Could it be, as the French philosopher Hubert Hannoun retorted, that under his provocations he concealed an embryonic neoliberalism which saw the state as an obstacle that should be reduced to its minimum expression?[4]

To dispel these doubts, the reader must consider that in the intellectual environment of these years a number of political dimensions were fighting for space; Iván Illich moved in just one of these, the oppression-liberation axis which held pride of place throughout the Third World in the late 1960s. This means that, whether or not he saw himself as an intellectual of the left, as many thinkers of the time undoubtedly did, he was not interested in exploiting the left-right axis to determine the appropriate roles of State and Market in the management of society. For him, in the Latin American context, what mattered most was liberation.

Having got these explanations out of the way, we can now go on to analyse why Iván Illich thought that making school compulsory – at least school as we know it – was a form of oppression.

As if the confusion caused in schools were not enough, combined with the fact that school claimed to be the only valid alternative for education, Iván Illich held that in the school system the meaning of the very word 'school' was extended to cover 'education', transforming the means into the end; in other words, education took second place to schooling. The key aspect to grasp behind this semantic dispute is that the system imposed the view that the important thing was to get good qualifications, to pass the course, to earn diplomas – in short to be successful in the school system, regardless of the pupils' particular objectives.

This extraordinary conception of education could be imposed, he explained, because schools cloaked themselves in sanctity by propagating a series of myths which were continually updated in school rites until they became accepted as dogmas. Following this line of reasoning, he concluded that schooling was a sort of world religion which had replaced traditional churches, contradicting, it may be noted in passing, many views which understood school as something anti-religious, or at least areligious.

Iván Illich was neither the only nor the first critic to find parallels between churches and schools. In the early decades of the 20th century, the Peruvian José Carlos Mariátegui had exposed this similarity and proposed endowing the education system with myths which fitted in with the socialist revolution.[5] Iván Illich, on the other hand, understood that nothing would be gained by substituting one set of myths by another, since it was the fact that they were myths, regardless of their contents or orientations, that prevented people from exercising their inalienable right to learn what they wanted, how they wanted.

The myths to which Iván Illich referred are indeed practically indistinguishable for initiates in the faith of schooling. Nevertheless, with patience it is possible to discover many precepts based purely on assumptions, for example: that learning is the fruit of teaching, that knowledge can be measured, that school certificates increase the value of the individual, that school is fundamental for getting on in the world or that it is governed by meritocratic criteria which fairly reward the brightest and the hardest workers.

According to Iván Illich, this mythology served various purposes at once. From the educational point of view, it favoured the perpetuation of school by promoting the idea that it was very hard to learn outside school, and that all knowledge generated beyond the school walls was of inferior category. This expropriation of the ability to learn was reinforced, he added, by certain dispositions that school fostered in the pupils, the most serious of which were lack of curiosity and impoverishment of the imagination. These elements acting in tandem would infantilise the population, preventing people from participating in decision-making on issues which concern them, either in education or any other sphere of reality.

From an economic point of view, this mythology reinforced the notion that the long-awaited progress, modernisation or development could only be achieved through consumption of industrial goods and services. Iván Illich understood therefore that school was at the service of industrial production, since it moulded people's expectations and needs so that they tended to consume industrialised products and services. The same message was drummed in by the functioning of schools, which were understood as cultural industries or – which comes to the same thing – as production lines operated by workers who drew on standardised inputs to produce a standardised result: avid consumers of all the goods or services available for sale.

Iván Illich did not criticise school because it produced consumers of this type. He criticised it because he thought that the hegemony of industrial production was not viable for humanity, on the grounds that natural resources were not infinite; and more importantly, because it would cause the exponential growth of violence, which sooner or later would sweep society away.

This latter point is linked to Iván Illich's perception that, in contrast to the message transmitted by school mythology, as long as the whole industrial production system, including school, maintained its dominion, the gap between rich and poor would always tend to widen. And while he recognised that being poor in his age was not the same as being poor in the 17th or 18th century, since society was enjoying ever-rising living standards, he nevertheless stressed that the differences between the richest and the poorest had not stopped growing.

> Industrialisation multiplies people and things. The underprivileged grow in number while the privileged consume more and more. In consequence, hunger grows among the poor and fear among the rich. Moved by hunger and a feeling of impotence, the poor demand faster industrialisation; driven by fear and the desire to protect their better standard of living, the rich embark on ever more explosive and armour-plated means of protection. As power becomes polarised, dissatisfaction becomes general.[6]

Going further, for Iván Illich school functioned in the industrial production system not only because it was charged with producing "good" consumers, but also because it safeguarded the social order by attenuating structural violence with discourses which induced in the poor an attitude of resignation to their subordinate position. He considered this meekness to be one of the principal effects of the hidden curriculum, since the doctrine that everything valid must come from school also implied that anyone who did not pass through its classrooms, or who dropped out, was worth less than those who did attend or advanced further. Thus, the message delivered by schools was that competition was a substantial part of life, that everyone should aspire to be a winner, and that the winners should enjoy the best conditions in life because they deserved them. This in turn explains why – because it goes against their mythology – schools never teach children, despite all the available evidence, that all competition implies winners and losers, and that the latter are the immense majority.

This line of reasoning accounts for the fact that in this epoch, as Iván Illich pointed out, the poorest of the poor were the illiterate. And this in turn explains why, whatever their political colour, literacy programmes have invariably enjoyed great resonance among the people. It explains, too, the fact that the resources allotted to schooling, particularly public funds, increased so spectacularly.

Having presented the principal nodes of his critique of education, all that remains is to ask who, in his view, benefited most from this whole situation. Was it the dominant sectors? Was it the entrepreneurs who produced school uniforms, materials or programmes? Iván Illich, diverging yet again from common sense, proposed that the nub of the problem

lay outside the benefits, intentions or aspirations of any group of people in particular. In other words, it was to be found neither in the voracity of the dominant sectors nor in the ineptitude of the popular sectors; neither in the avarice of the capitalists nor in the idealism of the socialists, and even less in the fact that some were underdeveloped and others were imperialists. He concluded that we are all at once both oppressors and oppressed, since we feed a mode of production that has escaped our control, and that imposes untiring growth as its sole purpose.

It was on the basis of this understanding of schooling that he postulated, in contrast to what the world demanded, that there was no need to allot more economic resources to the school system. On the contrary, it should be abolished. It was time to get rid of educationist escalation because the solution was not to promote more of the same, more schools, more depredation of natural resources and more unjust distribution of wealth. And yet – was it possible to even imagine the deschooling of society? It was not only possible, he maintained, but inevitable. And as he incited Bolivian schoolteachers to lead the last great revolution of the 20th century, he warned them that deschooling would occur with or without them.

On How to Deschool Society

Just as Iván Illich thought that deschooling would come sooner or later, he also considered that it would not be an easy or painless business, especially as the school system invests a large part of its resources in building up its strength and legitimacy. He also believed that deschooling could be accelerated if the many indications of discontent which questioned schools, in Latin America and elsewhere in the world, could be amplified. And he understood, too, that the sooner society was deschooled, the more people would be liberated from the baleful consequences of schooling.

There were many more in the world of education who believed, like Iván Illich, that the situation in the 1960s and 1970s was complicated. Indeed, one of the top brass of UNESCO, Philip Coombs, claimed that education was in crisis all over the world.[7] There were many factors which helped to form this critical scenario. They included those of a revolutionary tendency, raised by people who saw that injustice must be transformed without delay; and their counter-revolutionary equivalents, supported by all those who proposed to neutralise the former – which they saw as having the potential to destroy the social order. Among the revolutionary factors, for example, were the triumph of the Cuban Revolution in 1959, the proliferation of guerrilla hot spots in most Latin American countries, the 1968 student movements in Mexico, Brazil and France, the Civil Rights movement of Afroamericans in the United States, the boost given to liberation theology during the Episcopal Conference

held in Medellín in 1968, the national liberation struggles being waged in large parts of Asia and Africa and their echoes in the Caribbean, the electoral triumph of Chilean socialism in 1970 and the defeats inflicted on United States imperialism in Vietnam. The counter-revolutionary factors included the initiatives of the American CIA to destabilise the whole region socially, politically and economically; these efforts were closely linked to the dictatorships which – basing themselves on the Doctrine of National Security – fought to prevent any attempt to socialise wealth.

Whether because of the momentum of the revolutionary movements or the energy with which they were resisted, the idea of revolution became so important, at least in Latin America, that many analysts agree that it was almost within reach. In this environment, many intellectuals – including Iván Illich – assumed the responsibility of directing the revolutionary option which in their opinion would be the best or most efficient. Thus while before Iván Illich had burst onto the regional scene intellectuals had debated between committed or revolutionary positions, by the time his works were becoming popular in the late 1960s their dilemma had shifted towards the revolutionary pole – and he, like the rest, had to choose between the armed or the peaceful route to bring the revolution about.

Like many in those days, Iván Illich thought that it was in the Third World, in Latin America and particularly in Bolivia, that the revolutionary spark might be struck which would set the world ablaze. Nevertheless, unlike those who justified their appreciation by the misery experienced in the region, he thought in this way because he considered that here there were fewer people who were contaminated by the "new" religion, improving the possibilities that the school system would be cast over in favour of a liberating alternative.

Just as his diagnosis differed from more widely held revolutionary positions, the new society that he promoted also had its particular aspects. The only initiatives that he recognised as revolutionary were those that placed people at the centre of all their concerns, in contrast to those who aspired, first and foremost, to expand industrialisation and/or to facilitate economic growth. He defended his opinion with the reasoning that as soon as institutions, and other instruments which had once been invented to help the population, reached a certain size, they enslaved people and forced them into their service. What Iván Illich aspired to was that people should, in every respect, exercise their condition as political beings capable of taking independent decisions on all matters affecting them.

> We must recognise that human servitude has not been abolished by the machine, but that it has simply acquired a new face, since when the instrument crosses a certain threshold it is transformed from a servant into a despot. And when society crosses a certain threshold it is transformed into a school, a hospital or a prison. And that is

> when people start to be shut in. It is important to identify the exact location of this critical threshold for every component of world equilibrium. Only then will it be possible to coordinate a new form of the ancient triad of man, instrument and society. I call a society 'social' when modern instruments are at the service of members of the collective and not of a group of specialists. A social society is one in which man controls the instrument.[8]

As the above citation indicates, Iván Illich uses the word 'social' [*convivencial*] to describe this practice of putting people and the pursuit of their well-being first. To help readers to grasp this notion properly, we may ask tendentiously: What is the object sought in the field of health? To prolong existence for as many years as possible or to allow people to live happy, calm lives? What is the purpose of transport services? To allow a few tourists to travel to the moon or to ensure that we can all get about under deliberately set standards? And in education? Do we want the whole population to have university degrees, or each person to have at his command the necessary tools to learn what he considers appropriate?

To help in this process of 'socialisation', to accelerate the revolutionary process, Iván Illich believed that it was essential to raise the consciousness of the population, to open people's eyes to an understanding of the causes that kept them in a state of oppression. Obviously, he was not the only person who trusted in raising consciousness as a strategy for transforming reality; this idea was shared implicitly or explicitly by all those who felt that they had something crucial to communicate to society. Nevertheless, in contrast to more extended positions which saw consciousness-raising as a means for achieving liberation, he understood it as liberation in itself, the only way of breaking the spell cast by industrial production. Once the spell was broken, the future would be a blank page on which the liberated could write an autonomous dialogue with their fellows. In a sense, his programme was to sow questions without prescribing answers; it was to unmask the contradictions which appeared when the ends proclaimed by institutions were compared with the results achieved, but without imposing solutions; it was, in short, to trust in the indecisiveness implied by opening oneself to social coexistence between liberated beings.

To help break the spell cast by schooling, to open the horizon as wide as possible, Iván Illich focused on stimulating people's imagination. It was in this spirit that he claimed that the existing pyramidal school system could be replaced by a network of education. This implied abandoning the pretension to a rational or coherent system, which by its nature is manageable and controllable, making way for a complex web woven to match the interests of its participants. At heart, what he proposed was that certain minimum conditions should be guaranteed which would

enable this new educational structure to persist over time, since this was what was needed in order to accomplish his mission of facilitating contact between people with shared learning interests. It is not hard to perceive that, associated with this web, he was also proposing a particular conception of the construction of knowledge; one which differed widely from that prevailing to this day based on the principle that one person knows and teaches, and the other does not know and learns. In much the same way as the Brazilian educator Paulo Freire during those years, Iván Illich thought that we all had something to contribute to teaching-learning relations.

Among the initiatives which might give reality to this educational network, one which he defended most tenaciously was what he called the 'educational passport', which consisted in giving everyone the same number of credits which could be exchanged for educational services. He took great care to distinguish his proposal from other, market-oriented ideas which were starting to be heard in the mouths of neoliberal thinkers, since he made it clear that he was not proposing that people should be given credits to choose the educational institution they thought best – a demand subsidy in current jargon – as he did not conceive of the existence of professional educators or educational institutions which would make money out of this work. What he proposed was quite simply that institutions should exist which would provide some of the tools necessary for the acquisition of other sorts of learning, like reading and writing, mathematics, musical notation or foreign languages.

Apart from the 'passport', Iván Illich suggested other alternatives to give substance to his network: the creation of a public directory in which people could register their skills and interests; the transformation of a sector of every factory into a school to teach trades; freeing up access to all types of information through the proliferation of libraries containing books, sound recordings, films, etc.; and revitalising the idea of apprenticeships in all occupations. All these alternatives, like any other which aspired to foment social coexistence, would share a single requirement: that none should become an end in itself, but that they should all remain tools subject to the will of the individual.

Although Iván Illich thought that the revolution could be started in any of the institutions of the time – hospitalisation-health, militarisation-security, schooling-education – he appreciated that it was the latter which offered the best chances of success because it would be least prepared to resist assault. Nevertheless, although he understood that schooling was one of the weakest points of the circle of oppression, he saw that a number of difficulties would have to be overcome.

The first difficulty facing enthusiasts of deschooling was to answer the criticisms, well-founded or not, which emanated from those who defended schooling at all costs – the most vehement of whom were obviously those at the pinnacle of the educational pyramid, and in general all

those who felt threatened because their economic livelihood depended on school jobs. These critics tended to discredit deschooling by calling it impracticable or utopian, and very often poured scorn on its promoters, describing them as mad, ingenuous, irresponsible, agitators, liars, depraved, heretics, conservatives, barbarians, obscurantists, imperialists and/or subversives. Moreover, on more than one occasion these opinions took the form of intimidation and aggression directed at Iván Illich and his collaborators. Below is cited one of the passages where he identifies this difficulty most clearly:

> Anyone who proposes radically limiting school investment and finding more effective ways of educating children is committing political suicide. Opposition parties can allow themselves the luxury of questioning the need to build superhighways, they can oppose the purchase of armaments that will rust away between one parade and the next, but who in his right mind would contradict the irrefutable "need" to give every child the opportunity to earn his school certificate![9]

Another difficulty for the supporters of deschooling was to stand up to those views which proposed a similar reading of the crisis in education, and of the revolutionary climate of the time, but which fostered solutions that served only to deepen schooling. It should be noted that the dialogue between revolutionary positions, in these years at least, was complicated by the fact that the majority of intellectuals believed that they alone incarnated the correct view of the revolution. This hindered any kind of rapprochement between different positions, since if any were to achieve a measure of hegemony it would relegate the rest to the undesirable band of counter-revolutionaries. In strictly educational terms, this meant that deschooling had to defeat all other reformist proposals which maintained that the crisis could be solved with more funds, with different curriculum contents or with new teaching methods. In his characteristic tone Iván Illich declared:

> The education reformers who have accepted the idea that schools have failed may be classified into three groups. The most respectable are certainly the great masters of alchemy who promise better schools. The most seductive are the popular wizards who promise to transform every kitchen into an alchemist's laboratory. The most sinister are the new Masons of the Universe who want to transform the whole world into one vast temple of enlightenment.[10]

Another difficulty, perhaps the most challenging of all, was to resuscitate the atrophied imagination which was the final result of schooling. Iván Illich realised that schooling had achieved such proportions, had

become such a natural part of society, that it would be very difficult, even in Bolivia, to conceive of a world in which it did not exist – or more precisely, where attendance was not compulsory. He understood that dreams were so standardised, interests so industrialised and imaginations so programmed, that to break the spell woven by schooling was just as difficult as struggling against the myths that it promoted:

> So persuasive is the power of the institutions that we ourselves have created that they model not only our preferences but even our view of the possible. We cannot talk of modern means of transport without referring to cars and aeroplanes. We feel unable to talk about health problems without automatically implying the possibility of prolonging a sick life indefinitely. We have become completely incapable of thinking about a better education except in terms of still more complex schools, and teachers subjected to even longer periods of training. The horizon of our capacity for invention is blocked by gigantic institutions which produce extremely expensive services. We have limited our vision of the world to the framework formed by our institutions, and now we are their prisoners.[11]

Schooling and Social Transformation

Since its conceptual gestation began, deschooling has proved unable to break down the barriers which confront it. To confirm this, we have only to look and see that compulsory schooling still exists, and that the school system has continued to grow stronger. Although clarifying the motives that have prevented these ideas from overcoming their difficulties is beyond the scope of the present work, the fact remains that the thoughts of Iván Illich have obstinately stayed with us for a variety of reasons: because they are useful for broadening the horizons of social criticism, because the problems that they identify persist vigorously, and above all because they continue to represent the thinking of many.

Two further ideas arise from the last reason cited. Iván Illich's thought is still deemed valid because it channels an intimate and intense feeling present in many people, which has to do with the resentment, rejection and/or resistance provoked by fundamental aspects of schooling, such as hierarchisation and authoritarianism. To probe this feeling, it is worth taking a fresh look at some catalytic questions: Who has never wondered why we are forced in school to study subjects or perspectives in which we are not interested? Who has never been pleased to finish a school course simply because it is over?

His thought is also felt to remain topical because it continues to represent all those people who, after listening for decades to the same broken promises of the personal and social redemption brought by schooling, are disenchanted. In the 1980s, in the midst of the misery inflicted on

Latin America by the external debt crisis – debts contracted in large part to finance the growth in education which preceded it – the Chilean rock group *Los Prisioneros* popularised a song that became a hymn for young people all along the Pacific coast of South America: *El baile de los que sobran [The dance of those left out]*. The song expressed in music and words the ideas put forward by Iván Illich more than ten years before, criticising the school system for raising expectations that it could not meet. This serves to underline how well Illich perceived symptoms which spoke of the erosion that was starting to affect the social value placed on schooling; symptoms which continue to exist more or less intensely, and for that reason continue to breathe life into his thought.

How Iván Illich could distinguish these points which were imperceptible to most, including specialists in education, can probably be explained by three distinctive features of his intellectual activity. The first was that he knew the whole educational pyramid from the inside, having not only served as vice-rector of a university, but also, previously, obtained a doctorate in history. It seems probable that when he reached the top of the pyramid and realised that his possibilities of action were limited to acting as a repository of all the myths carried by schooling, or else stepping aside to reflect on them and criticise, he chose the latter course, at least in the years discussed here.

The second is methodological: his dialogues with Everett Reimer and the visitors to CIDOC would appear to have given his thinking a depth and incisiveness which he could probably not have developed through other strategies for analysing contemporary reality. Moreover, some of the characteristics of these dialogues gave greater force to their results, for example, having kept him up to date, having nourished his thinking with the most restless positions of the moment, and having been developed in an environment of great financial autonomy. The point made with the last of these features is that these conversations were financed indirectly by CIDOC without any kind of formal condition, giving them a freedom and independence seldom found in those who must reflect to order, or with the object of pleasing persons or institutions. As the Mexican political scientist Jorge Márquez Muñoz remembers, Iván Illich used to say that in CIDOC nobody was paying them to think, and therefore they could think freely.[12]

The third is the place where these dialogues took place, Latin America, a faithful representative of the revolutionised Third World. Iván Illich, extrapolating certain reflections on the particular nature of Latin American thought expressed by the Mexican philosopher Leopoldo Zea, appears to have appreciated realities that many other thinkers could not because they were anchored in the complex and contradictory reality of the region; he was able to see oppression and liberation simultaneously, or to put it another way, he could share the experience of the dominated and the dominator at the same time.[13]

In explanation of this last appreciation, it may be added that Iván Illich, unlike other intellectuals who also worked at the front, moved with equal ease on both sides of the dividing line, allowing him to talk both to Latin Americans and to First World figures with all the authority given by the feeling that he was one of them. His First World nature can be seen in his educational career; however, his Latin American identity, at first sight at least, is not so obvious. Indeed, he is not included in an exhaustive work published only recently on the principal Latin American intellectuals, *The philosophical thought of Latin America, the Caribbean and "Latin" societies (1300–2000).*[14] Despite this exclusion, the fact remains that his Latin American identity can be corroborated on various grounds. Because he was very familiar with the thought of many of his peers in the region, like the Brazilian Helder Câmara, the Bolivian Mariano Baptista Gumucio and the Colombian Camilo Torres. Because his thinking can be included without difficulty in the tradition which places the individual and his happiness at the centre of all understanding – a sensitivity inaugurated by the Cuban José Martí and the Uruguayan José Enrique Rodó around the end of the 19th century and the start of the 20th. Because he took an active part in the discussions going on across the whole region which sought to impose acceptance for some referents regarded as key, such as the notions of people, development, dependence, liberation and revolution. And because he also shared one of the most characteristic stamps of contemporary Latin American critical thought, that of possessing an urgent manner of writing which stressed utopianism and originality.

But most of all it was Iván Illich's ability to distinguish what others missed that enabled him to construct an unprecedented approach to an issue that was at the heart of debate at the time, the potential role of schooling in the transformation of society. In 1974, a public debate was organised in Geneva, Switzerland, between him and Paulo Freire, then the two most influential intellectuals in thought on the subject of education. This debate centred precisely on the links between education and social transformation. Paulo Freire expounded his position with crystalline clarity, arguing that education responded to the prevailing political and economic structure in society, meaning that for it to have a liberating purpose it must be rooted in a society which was heading in the same direction. Iván Illich in contrast adopted a cryptic position that was beyond clarification even when he answered questions from the audience. He maintained – borrowing a phrase from Paulo Freire himself – that education transformed insofar as it supported the "correct transformation of what it transformed".[15] What did he mean by that?

He was trying to put across the idea that schooling did transform society, but not in the sense of achieving greater social justice; on the contrary, it widened the gap between rich and poor. In other words, Iván Illich did not recognise any progressive purpose in schooling – not

even the modest purpose proposed today by some of the principal Latin American authorities in critical pedagogy, who claim that while revolutions cannot be launched from schools, schools can form those who will lead tomorrow's revolutions. And he went further, believing that those who insisted that schooling could be liberating in a sympathetic political-economic framework achieved nothing but the perpetuation of oppression, since in practice they protected the school system from any substantial criticism under the pretext of waiting for more changes to enable it to finally come up to the expectations and needs of its beneficiaries.

> Schools are fundamentally identical in all countries, be they fascist, democratic or socialist, big or small, rich or poor. This similarity between school systems forces us to recognise the profoundly universal identity of the myth, the mode of production and the method of social control, despite the wide variety of mythologies in which the myth finds expression.
>
> In view of this identity, it is illusory to proclaim that schools can be, in any meaningful way, dependent variables. This implies that it is also an illusion to expect that a fundamental change in the school system will result from social or economic change, as conventionally understood. What is more, this illusion guarantees the school system – being as it is a reproductive organ of the consumer society – unquestionable immunity.[16]

To recapitulate, Iván Illich managed to break out of the chicken and egg logic by analysing the possible role of schooling in the transformation of society, because he did not believe that it was necessary to intervene in the school system first to get a better society, or on the contrary to transform the general political and economic framework in order for the school system to follow. The alternative, as he suggested to Bolivian schoolteachers in the early 1970s, was to carry out a cultural revolution capable of doing away with compulsory schooling.

In a region rich in contradictions like Latin America, where education is the repository of so many hopes, it would be injudicious to set aside ideas such as Iván Illich proposed, especially when it is clear that the formulae that have been preferred to date, regardless of their declared intentions, have not come up to the mark. It would seem that it is not enough to go on trying to do better what has been done for a hundred years; that route has not managed to solve the problems of society, on the contrary it has aggravated them. Should we pour more money into the school system? Should we modify teaching methods, improve teaching materials or adapt curricula? Iván Illich's ideas do not help to answer these questions. His contribution is much simpler, and at the same time more fundamental; his work helps us to consider what we think schools are for, and why.

Notes

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2 Fromm, E. Introducción. In: Illich, I. *Alternativas*, Mexico City: Editorial Joaquín Mortiz, 1977 [1970], p. 10.

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4 Hannoun, H. *Iván Illich o la escuela sin sociedad*, Barcelona: Ediciones Península, 1976 [1973], p. 230.

5 For Mariátegui see, int. al., Donoso Romo, A. *Identidad y educación en América Latina*, Caracas: Editorial Laboratorio Educativo, 2012, p. 94.

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12 Márquez Muñoz, J. El filósofo convencional. In: Márquez Muñoz, J. (Comp.) *El otro titán: Iván Illich*, Mexico City: Grupo Editorial Tomo, 2003, p. 18.

13 See Zea, L. *América en la historia*, Madrid: Ediciones de la Revista de Occidente, 1970 [1957], pp. 178–179.

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5 Paulo Freire, Latin American Thought and the Struggle for Liberation*

The First Lessons Learnt by Paulo Freire

The fact that Paulo Freire is one of the best-known educators not only in Latin America but also in the world might be intimidating if our object were to create an interpretation of his thought to compete with the many that already exist; or stimulating if we were to assume that there are already many good works on which to base any analysis. Our aim in taking up this challenge is to study one of the dimensions of his thinking on which the last word can never be written, namely how it is possible to use reflection on education to contribute to the creation of a better world. In this spirit, the following chapter will explore the relations which, according to him, exist between education and social transformation. These relations were set in the framework of mid-20th century Latin American thought and plunged into the context of the revolutionary struggles fought out in Latin America during those years. The chapter is divided into four sections: the first observes the process by which this educator learnt his letters, the second studies more deeply the features which made his proposals for literacy teaching so effective, the third relates his own thought to the intellectual movement that proposed to contribute to the construction of a new society and the fourth will examine the role that he assigned to education in revolutionary struggles.

Perhaps the most important lessons that Paulo Freire received in his whole life were those imparted by his father, Joaquim, and his mother, Edeltrudes, in his earliest childhood. During the 1920s, under the fruit trees of his parents' house in Recife, the three drew letters in the sand so that one day little Paulo could enter the world of reading and writing. In these lessons he not only found his way into the lettered city, but he also learnt a secret which, over time, became his most valuable legacy: that to learn literacy, to learn to read and write, the only truly indispensable condition was love.

In these years his mother taught him other types of understanding which would become fundamental pillars of his thought, one of which was the idea that education was something sacred, and as such deserved profound respect and demanded deep devotion. She believed that

education was the best inheritance that she could leave her children, since it would provide them with tools which would enable them to live better in that future when a person can no longer depend on his parents. An example, reported by the Colombian sociologist Orlando Fals Borda, will help to illustrate how far this understanding had spread by the middle of the 20th century: he noted that many peasants were starting to spend their savings on education for their children, rather than on their land as had been the case until only a few years earlier.[1]

It was this high value that she placed on education that sent Edeltrudes knocking on every door necessary to enable her son to leap the customary barrier shutting him off from secondary education, and go to high school. His mother's persistence proved the turning point which enabled the Paulo Freire to cross over from the education system available to the popular sectors, which concluded irremediably with the end of primary school, to that of the dominant sectors, generally crowned by a university degree. He achieved the transfer so successfully that in 1959 he was awarded his Doctorate in Philosophy and History of Education by the University of Recife, today the Federal University of Pernambuco, to which he would later add more than thirty honorary doctorates.

It is also thanks to his mother that we can infer the importance that young Paulo Freire attached to his education, since she recorded that he was capable of missing school if he realised that he had not learnt properly the subjects that he should have studied at home. It was this importance that led him to decide, while still a child, that he wanted to devote his life to teaching. As he confided in a dialogue with the US educator Myles Horton:

> One of my first dreams as a child was to teach. To this day I remember how I talked to myself about becoming a teacher, even when I was still in primary school. [...] If you had asked me then what I wanted to teach, I wouldn't have known, but I think that I had a kind of love for teaching.[2]

It was probably his father, who served for a time in the police and also in the military, who taught him that weapons were a feature of this world. It was his father, too, who was the first person to label him as subversive, although of course in a rather unusual sense. He commented that when Paulo grew up he would be a subversive, because he did not allow injustice to be whitewashed by indifference; because it angered him, and he showed it, if someone was disrespectful to a black woman because of the colour of her skin, or if his friends in the neighbourhood went hungry for lack of money.

Love, letters and subversiveness were therefore the elements ingrained early in life in the heart and mind of Paulo Freire. And these were the

marks that he later stamped on each of the educational experiments that would lead to him being recognised as one of the great educators of our time. He never forgot them, for he was tireless in his urge to be consistent with his ideals, to match his practice to his convictions, to ensure that his actions were consistent with his thoughts.

Paulo Freire, like so many children, wanted a football and a better world. He received the football from the hands of Ana Maria, his second wife, at one of his last Christmases. The better world was what he left, with all his work, as his legacy to humanity. Did he never make a mistake? Of course, he did – we all do, every day. But it must never be forgotten that he devoted all his energy to transforming the world into a place where it would be easier to love. In consequence, what the reader will find here is one of the greatest fruits of his efforts: his vision of how education could make this dream come true.

The Bases of His Proposal for Education

In January 1964, three months after the coup that would plunge Brazil into mourning for more than 20 years, the successful literacy project led by Paulo Freire in the city of Angicos, in the north-east of the country, found its support from the Alliance for Progress cut off – the Alliance for Progress was the principal reforming strategy deployed by the United States to counter the influence of the Cuban Revolution. The reasons for this decision have never been fully clarified, although all the indications suggest that it was because literacy was not being taught in accordance with US parameters; to put it another way, there was official disapproval of teaching literacy in a way that also involved encouraging the learners to reflect on their everyday lives, and, worse still, invited them to act as they thought.

This educational project was widely regarded as a great success. By cutting off its support, the Alliance for Progress made a decisive contribution to consigning to oblivion, after more than a century of extensive and uninterrupted action, one of the principal driving forces of enlightened Latin American thought: that the education of the people was fundamental to enable them to exercise their sovereignty. As the Argentinian essayist Aníbal Ponce had said long before in his *Education and class struggle*, published in 1937, this kind of behaviour made it clear that the dominant sectors would not promote education if it went against their interests.[3] In other words, actions like this revealed clearly that the priority of the dominant sectors was not education for its own sake, as they so often proclaimed, but safeguarding their position of advantage.

The ground lost by enlightened discourse was quickly occupied by an emerging current of ideas, eminently Latin American, known as "popular education". This current was based on the understanding that

it was possible to educate in different ways; that distinctions should be established between modes of education. For that reason, it authorised every individual to consider one mode or another as the best or the most appropriate. Paulo Freire was not only one of the protagonists of "popular education", indeed he was widely recognised as one of its principal exponents; but he was also one of those who thought that different types of education should be distinguished, apart from their technical characteristics, by the political visions in which they were set.

For while previously the notion of "popular education" had referred basically to the education intended specifically for the popular sectors, in other words the poor education received by the poor, it now started to mean also the education that the popular sectors created for themselves. The first meaning remained current in national education, official schooling and primary education systems. The second is associated to this day with education outside the classroom, informal education and education in general carried out without the participation of the state. It reached one of its high points when it was adopted by the non-governmental organisations which arose in the 1980s. Latin American states, partly due to the economic disaster brought by the external debt crisis and partly thanks to neoliberalism, which was beginning to gain a foothold, started to lose the leading role in education that they had assumed since the turn of the century.

Just as it is right to stress the importance of Paulo Freire in the development and dissemination of "popular education", it is necessary also to underline that he was just one among many who gave life to this perspective, and not its "only" proponent as is sometimes claimed. He understood this very clearly, as is shown by the fact that he displayed no hesitation in recalling that he had developed his method for literacy teaching by adapting some of the ideas he had learnt while working in a "popular education" initiative in Brazil, the Popular Culture Movement. It is likewise recorded that on a certain occasion, when asked about the origins of one of the principal features of his proposal, the notion of 'consciousness-raising' [*conscientização*], he acknowledged that he had first heard of it in meetings organised by the Brazilian Institute of Higher Studies, and that many people were supporting its dissemination – including the Archbishop of Olinda and Recife, Helder Câmara.

This is not the place for a detailed description of his method of literacy teaching; not only is it outside the scope of this work, but excellent descriptions exist in many other places. What the reader will find here is an analysis of his method which will explain why it achieved such good results, and at the same time, why it was so controversial. At bottom, what is suggested here is that behind his proposal lay the marvellously simple understanding that every human endeavour enjoys a better chance of success if the people involved feel comfortable. And while feeling comfortable may depend on a wide range of factors, there is one which is

clearly fundamental, namely that all the participants must be fully convinced of the importance of what they are doing.

Consequently, every single component of his literacy teaching method sought to highlight the importance of reading and writing for the learners. Thus, in session after session their initial motivation to learn was reinforced. They were reminded, among other things, that this was their chance to level the tables with all those who took advantage of their ignorance; that they were acquiring a skill which would enable them to better understand their environment, and that they would be able to commit their own thoughts to paper, making it easier to think, to think about themselves, to rethink themselves.

In societies where education was increasingly valued, and therefore the illiterate were increasingly undervalued, the first challenge was to neutralise the stigma attached to adult learners. It was this concern that led Paulo Freire to dispense with some of the terms associated with school education, like the words school, teacher and pupil, and replace them, respectively, with culture circle, coordinator and participant. While at first he discarded the conventional terms because they might nurture a feeling of inferiority in the beneficiaries, suggesting that they were attending a supplementary or second rate institution, he came to believe that the substitute terms could strengthen the idea that the beneficiaries were participating in activities designed especially for them. Thus he sought to transmit the conviction that they were not there to enter the school system or to turn out one day with degrees or doctorates, but that they were part of a system which was valuable in and of itself, which followed its own independent path, and in which they could achieve things that they would never achieve in any other space.

The contents studied were also adapted to this purpose of generating the greatest possible interest in the learners. They were taken from the participants' everyday lives through studies to identify subjects which affected communities, and then converted into teaching materials specially designed for them. Because the material was full of references which were known and highly significant, it helped the participants to become involved in the learning experience and to broaden their knowledge. The same thinking led Paulo Freire to abandon the use of exercise books or notebooks in teaching literacy to adult learners, and this was in fact one of the points of disagreement which led the Alliance for Progress to abandon the project in Angicos. While the Americans argued that it was necessary for learners to have complementary material to enable them to reinforce at home what they had learnt in class, Paulo Freire said that the most important thing, especially in the early stages of literacy learning, was to hold the participants' attention as closely as possible, which exercise books and notebooks had proved unable to do.

Talking about his methodology, he stressed, in line with these comments, that it allowed all the participants to contribute actively to the

process. He therefore eschewed procedures based on the idea that only one person knows and teaches, and encouraged those based on the notion that everyone knows some things and is ignorant of others, therefore everyone should contribute and everyone could learn. This robbed not only teacher monologues but also learning by rote and other traditional teaching methods of their sense, allowing conversation, dialogue as Paulo Freire preferred to call it, to become installed in the heart of educational activity. His methodology was supported by the understanding that all those involved were equally important in educational processes, and that all had their culture. He stressed the latter point by saying that we are all immersed in cultural contexts, adding that the absence of culture existed only in the minds of those who sought to disqualify other people's knowledge.

The above will make it clear that there was no improvisation, luck or magic behind the good results achieved in Angicos by Paulo Freire's methods; on the contrary, there was reflection, analysis and planning blended with experimentation, well thought-out choices and correction of errors. There was, above all, a sincere intention to give his participants the tools that would enable them both to read the written word and to interpret their lives, a vital step on the path to being able to write their own history. This in turn shows that he did not teach literacy to adults by adapting the strategies used with children. The method used by Freire was what he called "Literacy teaching by consciousness-raising",[4] which, far from teaching "A is for apple, B is for bed" by simple repetition, was designed to warn participants

> of the dangers of their time so that consciousness of these would give them the strength and the courage to struggle [...]. It was a form of education that would bring each one into constant dialogue with the other. That would invite them to review constantly and analyse critically their 'beliefs'; to a certain rebelliousness, in the most human sense of the expression.[5]

It goes without saying that the good results obtained by Paulo Freire in Angicos did not just decide the Alliance for Progress to withdraw from the process. They had already brought his method to the attention of specialists and politicians throughout Brazil, to the point where the Federal government had decided to extend it on a national scale. Following this interpretation, the reason behind this support for Paulo Freire's method was the same that made it undesirable in other eyes: it enabled people to become literate while reflecting on their reality. To this should be added the fact that in Brazil, as in Bolivia and Ecuador at that time, literacy was a prerequisite for the right to vote. And in Latin American societies, where public affairs were starting to escape the exclusive domain of the dominant sectors, obtaining the vote was seen as an urgent

right and one of the principal practical motives for eliminating illiteracy. So important was this method for the government of João Goulart in Brazil, that if the National Literacy Campaign led by Paulo Freire from the middle of 1963 had followed its course, in 1964 alone two million people, with their consciousness raised, would have been added to the electoral rolls.

As history relates, positions within the dominant sectors of Brazil were divided, and the grouping which triumphed was that which sought to hold back the empowerment of the popular sectors. In other words, the dictatorship that seized power Brazil, like most of those that descended on countries across the region during the following years, sought, on the one hand, to prevent any revolutionary changes, and, on the other hand, to direct those reforms which, in any scenario, they understood to be inevitable. In the field of the present study, there are many indications that support this reading, not least the immediate paralysation of all cultural policies when the dictatorship seized power, and the persecution of their promoters. Without going into more detail, the reader will recall that Paulo Freire was interrogated and imprisoned on two occasions before he decided to flee the country and go into exile.

Liberation Education as Part of Latin American Thought

"Long live oxygen!" were Paulo Freire's first words when he arrived in Chile in November 1964. No doubt they express the mixture of relief and joy that he felt after spending a few weeks in La Paz, a city where every visitor suffers the effects of altitude sickness.[6] Nevertheless, if we could suggest the following interpretation to him, he would probably agree: that it was a breath of fresh air to leave behind those difficult months in which he had gained personal experience of what it meant to live under a dictatorship, and to arrive in a country which was just starting to be recognised as one of the leading lights of the left in Latin America.

Paulo Freire remained in Chile from November 1964 until April 1969, coinciding with the years of the so-called "Revolution in liberty" – headed by the Christian Democrat president Eduardo Frei Montalva – which aspired to the dream of reconciling the best of capitalism with the best of socialism. In these years, and during this exile, he was able to distance himself from what had happened in his native Brazil and to weigh it up objectively; his ideas on education, politics and culture matured, and he forged his Latin American identity, in common with most of the intellectuals moving about the region, which he would later recognise as a fundamental link between his identities as a citizen of Recife and a citizen of the world. In this period also he produced two of his best-known works, *Education, the practice of freedom* (1965) and *Pedagogy of the oppressed* (1968), both completed in Santiago.

Although both books were well received by the public, especially those readers who considered themselves revolutionary and/or were attempting to promote experiments in liberation education, *Pedagogy of the oppressed* enjoyed greater success. This work was so admired that many organisations used their own presses to reproduce it, while some individuals devoted themselves to making manuscript copies of the text and others even took the risk of smuggling it into countries where simple possession of the book was sufficient reason for their names to be added to the list of the 'disappeared'. The enormous popularity of this book can be dimensioned in many ways – suffice it to say that it has run to hundreds of editions, that it has been translated into over twenty languages, and that it is still in print.

The success of these two books, and the fact that they were on the bookshelves of revolutionary pioneers or heartened resistance to dictators, can be ascribed to a number of factors. One is regarded as fundamental: the fact that their pages were based on concrete experiences, with the object of supporting other concrete experiences. They were works which smelt and tasted of reality, which were devoted to reality. They discussed matters that students, militants and leaders all across Latin America were discussing in their houses, in cafés, in meetings.

And this very fact displays another fundamental characteristic of Freire's writing: he did not set out to debate with other intellectuals or dialogue with other books. To contribute to a better world, he thought, the best thing he could do was to speak directly to those who were able to transform reality, the disinherited of the earth and those who fought at their sides. Thus, rather than commenting on ideas or authors, he wanted to take part in the discussions of the moment and in that way contribute to the struggle, convince the undecided and expose those who claimed to support popular causes but in fact only held them back. This is not to say that he did not use ideas developed by other thinkers; he did, frequently. But he used them basically as aids to communicate his own interpretations more clearly. To some extent, the seriousness of the problems that he analysed gave such urgency to his texts that they did not leave him time to criticise other proposals and/or react to the interventions of his readers.

In this urge to accompany, to convince, to seduce, Paulo Freire used the language used in the trenches by those who believed in words as weapons. One of the stamps of his militant writing was his eager attempt to distinguish good from evil, good people from bad, the desirable from the undesirable. On one side were those who were in the author's band, the oppressed and the revolutionary to whom his works were addressed. On the other were the oppressors, those who sought to subjugate others, those who tried to make people believe that injustice was the norm. In this sort of semantic struggle, he focused his energy, on the one hand, on defending what he considered authentic, real, genuine or true, and,

on the other hand, on unmasking, denouncing and condemning all that in his view was false, harmful or unreal. Thus, page after page contains definitions of what for him was the true word, true education, true revolution, even true love.

These definitions are too vast to be summarised in a work like the present; however we may note that many of the basic objectives to which he contributed, what for him was true, right, authentic or real, were also shared by a significant proportion of left-leaning intellectuals in Latin America. He sought to use education, as others used economics, philosophy, theology, history, theatre, sociology or politics, to contribute to the revolutionary processes which would pave the way for the birth of the "new man",[7] and this aspect merits a closer look.

Paulo Freire, like many who believed in development, thought that progress was possible, and that poverty could be overcome by scientific study of reality and drawing up plans based on the findings. Like all those who were influenced by the nascent multilateral organisations and the brand new regional study centres, he believed that the cultural and identity dimensions of the Latin American population were problematic, unsatisfactory and/or deficient, which in practice translated into the need to replace every aspect of peasant or traditional life with urban or modern equivalents. The former were seen as signs of ignorance or superstition, while the latter as rational or efficient. But unlike more common expressions of these views, which postulated mechanical substitution of one mentality by the other, he insisted that it was necessary to start from the traditional in order to move towards the modern.

> We cannot educate if we do not start – I say start, not remain – at the levels at which people perceive themselves, the relations that they establish with the other and with reality, precisely because this is what constitutes their knowledge. To have knowledge, all that is needed is to be alive: as people, we *know*. The point is to discover what people know and how they know it, and learn to teach them things that they do not know but want to learn. The point is to know whether my knowledge is necessary, because sometimes it is not. At other times it is, but people have not yet perceived the need. Thus one of the tasks of the educator is to press people into discovering the need to know, but never to impose knowledge for which they do not yet perceive the need. And sometimes the need is felt – isn't it? – but not yet perceived. There is a difference.[8]

He also reasoned, like those who subscribed to the theory of dependence, that to put an end to the problems and diseases of poverty it was necessary to improve material conditions by economic growth – as indeed occurred in Latin America uninterruptedly after the world recovered from the economic crisis of 1929 until the beginning of the 1980s.

But he added that relations between the countries of the First and Third Worlds needed to be analysed carefully to prevent the former from basing their well-being on the ill-being of the latter. Two of the questions discussed by these thinkers were: If economic indicators were improving, why was poverty increasing? Why did underdevelopment seem to develop, or rather, as Paulo Freire understood it, why did it take the form of dependent development? Faced with questions like these, intellectuals found it increasingly difficult to go on believing in the formulae that the developed countries imposed as the means of emulating them, and increasingly subscribed to the understanding that development and underdevelopment were two sides of the same coin. Paulo Freire was among those who helped to establish these views, but at the same time he noted – among other things – that a Third World existed inside First World societies, namely their popular sectors, and a First World inside Third World societies, the dominant sectors. He comments:

> Latin America can only develop once it has resolved the fundamental contradiction which determines its dependence. This means that the decisive moment for its transformation is to be found within its societies, but at the same time not in the hands of a bourgeois elite which is superimposed on the oppressed masses of the people. Integrated development is impossible in a class society. It is in this sense that development is liberation: on the one hand of a dependent society from imperialism; on the other of the oppressed classes from their oppressors.[9]

Paulo Freire also believed, like the theologists of liberation, that one should choose the side of the poor and that all people are equal before God. Following this line of reasoning, among others, he thought that there was no justification for continuing to feed the illogicality that the dominant sectors enjoyed most ecclesiastical services. Like all those who contributed to liberation theology, including the priests Camilo Torres of the National Liberation Army of Colombia and Néstor García Gaitán of the Sandinista National Liberation Front of Nicaragua, he understood that the structural violence which kept the popular sectors in misery could not be confused with the insurrectional violence used by the latter to put an end to all violence. He thought, as Monsignor Óscar Arnulfo Romero of El Salvador and Bishop Enrique Angelelli of Argentina – both murdered for their convictions – must have thought, that if it was no longer enough to pray, turning the other cheek was also useless.

But the representatives of this offshoot of Christianity were not the only people to contribute to the line of argument which advocated violence to achieve liberation, nor the only ones who took up arms to pursue it. There were many groups in Latin America in the second half of the 20th century who made arms their principal argument – in Brazil alone there were more than 30 organisations which opted for armed struggle.

There are many allusions in Paulo Freire's writings which chime with the principal postulates of liberation theology and the various liberation armies, although it must be said that none of them explicitly invited people to violence; they tended rather to justify it:

> Paradoxical as it may appear, it is in the response of the oppressed to the violence of their oppressors that we will find the workings of love. Consciously or unconsciously, the act of rebellion by the oppressed – which is always just as violent as the violence on which it feeds, or nearly so – this act of the oppressed can open the way to love.
>
> While the violence of the oppressors prohibits the oppressed from being, the response of the latter to violence is impregnated with a desire to pursue the right to be [...].
>
> The important point, therefore, is that the struggle of the oppressed should be waged to overcome the contradiction in which they find themselves. And their victory should be the birth of the new man: no more oppressor, no more oppressed, just man liberating himself.[10]

Apart from allusions like the above, there are many other clues indicating that he condoned the views described. For example, before leaving Brazil he backed the Cuban Revolution, signing a collective declaration of solidarity with the island. In *Pedagogy of the oppressed* he included many expressions of reverence towards figures for whom violence was a central plank of their understanding, such as the commanders of the Rebel Army Ernesto Guevara and Fidel Castro, and indeed Camilo Torres. In the 1970s and 1980s, he shared his knowledge with guerrilla groups, and also advised countries recently liberated by force of arms, including the Nicaragua of Ernesto Cardenal and the Grenada of Maurice Bishop.

Perhaps one of the passages where Paulo Freire insinuates most suggestively his thinking on insurrectional violence is to be found in his book *Pedagogy of hope*. Remembering a conversation in the mid-1970s with the Brazilian anthropologist Darcy Ribeiro, he states that the dictatorship had seized power in Chile in 1973 more for what the popular government had got right than – as is commonly heard – for what it got wrong, its errors and failings. His words, though brief, are eloquent:

> We talked about Chile. About his meetings with Allende, about the truly democratic spirit of the murdered president; about the coup in Chile which would have occurred even if the left had not committed the errors that it committed. The fewer errors it had committed, the sooner would the coup have happened. At the end of the day, the reason for the coup is to be found much more in the good decisions of the left than in its mistakes.[11]

After the coup in Chile, there were fewer and fewer militants of the left who harboured doubts about the legitimacy of insurrectional violence and the effectiveness of peaceful paths to socialism. And one way or another, the death of Salvador Allende marked the death of all the peaceful strategies that did not fit in with the Doctrine of National Security. The other side of the coin was that coup leaders, from that moment on, would act as if they understood that there was no more room for idealistic games; or to put it another way, as if they understood that it was cheaper to keep order by repression than by tolerating democracies that they described as "populist".

If Paulo Freire shared the basic conclusions of these analyses, in other words if he believed that revolutionary violence was inevitable, why did he not take up arms alongside so many others who thought the same? Why did he continue working in the field of culture if he believed that armed struggle was the only means capable of giving birth to this new society? Pursuing our curiosity a little further, why did he leave Chile in 1969, when the country was immersed in one of the region's most promising revolutionary processes, but which lacked an energetic armed defence when it needed one? And more controversially, why – when so many Latin Americans rejected offers from the United States because they considered them to be part of a broader strategy of cultural colonisation – did he leave Latin America to accept the invitation of one of the brain-cells of the empire, Harvard University?

Education and Social Transformation

Let us not fall into the old trap of treating people as gods, a practice so widespread in the case of our subject that many people even describe themselves as "Freirians". In our interpretation he is not to be understood as an oracle who had the right answer for everything. This would be to ignore the context in which he developed his thought and, more serious still, to ignore some of his greatest qualities: the ability to understand precisely the conjectures of his time and to express his position with sufficient clarity to make him an authoritative voice for the thinking of many.

Likewise, he never regarded himself as an exceptional person. This is shown by the vast number of references with which he acknowledged his intellectual debts, and also by his manifest concern to avoid becoming a myth; and finally, by his open defence of his conception of originality. He liked to express this conception with the help of an idea that he attributed to the well-known US educator John Dewey: originality, he said, was not to be found in the imagination, "but in the new use of known things".[12]

In the 1980s, when reflections on the 'popular' – popular education, popular culture – were at their height, when the Argentinean anthropologist Néstor García Canclini published one of his best works, *Popular*

cultures in capitalism,[13] another universal anthropologist, the Mexican Guillermo Bonfil Batalla, expressed very happily in writing the basis of the notion of originality shared by Paulo Freire. Bonfil taught that what was important was not the date or place of birth of an idea, much less its supposed parentage or the motives surrounding its birth; the important thing, he explained, was that the use of the idea should be sovereign – that it should be used to satisfy the purposes of the user and not purposes imposed by others.[14]

The object of this lengthy preamble is to declare that it is of no interest to explore the personal reasons which, at the end of the 1960s, led Paulo Freire to leave Chile and settle in the United States. What is of interest, on the other hand, is to reflect on the political conditioners in which this decision makes sense, since they open a window on the links between education and social transformation. At all events, and to leave no room for doubt, it is widely believed – among others by Jean-Paul Sartre, who in 1964 rejected the Nobel Prize for Literature on the same grounds – that the danger of becoming involved in any cultural policy is that of ceasing to think for oneself, of embracing irreflexively the point of view of the financiers, of being co-opted or, in Paulo Freire's term, tamed. And that certainly never happened to him. Whatever his audience, from the illiterate inhabitants of north-eastern Brazil to the academics of Harvard, he always expounded his work without equivocation; he never modified it to please his listeners, not even the policemen who interrogated him so inamicably in Brazil in the difficult years.

To return to the question of why Paulo Freire never took up arms, and why he moved away from revolutionised Latin America, it is thought that he preferred to contribute through active participation in discussions about the most appropriate strategies for strengthening revolutionary processes. In this context, accepting the invitation from the United States provided him with a platform which could give greater visibility to his views, an aspiration automatically assumed to be desirable by all who take part in contests to define the good.

As in the semantic struggle discussed in the previous section, his postulates were pitted against both reformist and decidedly counter-revolutionary positions, another arena where it was fundamental to persuade those who defended spurious revolutionary postures. In his view, this included all those who adopted sectarian positions in which history was assumed to be known, and therefore offered no space for individuals to alter its course. People had either to accept the problems and constrictions of their situation with resignation, or to wait patiently till the desired events miraculously came about; there was no other alternative. For people who adopted such positions, therefore, no struggle made any sense. For Paulo Freire in contrast, there could be no social transformation without struggle, and there could be no struggle if people's consciousness was not raised about what was required to put an end

to oppression. Moreover, he thought that sectarian positions tended to encourage authoritarian relations in which the situation was repeated of some who knew and taught while others did not know and learnt. He considered that this dynamic could never involve people in the teaching process, undermining both its effectiveness and its legitimacy and transforming the disregarded into potential detractors.

The posture defended by Paulo Freire took consciousness-raising and dialogue as the cultural axes of any liberation strategy. Before any assumption of power, he thought, popular education, the education of the oppressed, must be used to strengthen the convictions which would motivate people to join and/or remain faithful to the struggle, regardless of which trench they chose to fight in. Once power had been won, formal education must involve the population in the permanent defence and extension of their gains. This meant that their new consciousness would enable people to discover that they were oppressed, that their oppressors did everything possible to keep them in that state; and to understand that only by fighting with the weapons at their disposal, shaking off the fear of liberation, could they liberate themselves and the whole of society. Thus, although consciousness-raising through education was not an objective in itself, it was an essential pillar of revolutionary processes.

The education defended by Paulo Freire was so indissolubly linked to the revolution, that over time he started to emphasise that the important thing was not for people to become conscious of the domination under which they suffered, but to understand that this consciousness was only an essential and necessary prior condition for the transformation of society. This explains why he criticised conservatives who wanted people to adapt and conform their ideas to reality, leaving intact the privileges of one group and the misery of the other; it also explains why he stimulated the contrary practice in revolutionaries, of transforming their lives to match their ideas. Thus, in each new work he expressed with greater clarity the idea that any revolution which was not accompanied by liberating cultural development would be unworkable; or, if it were to triumph by chance, would quickly become indistinguishable from a vile dictatorship. In other words, the ends of liberation would not be achieved with the means of oppression: the means had to be consistent with the ends, thought with action, theory with practice. In the final analysis, he declared, nobody liberated anybody else. People had to reach the conviction of their own accord that they must join the revolutionary ranks without delay.

Paulo Freire was not the only one who thought that education could support revolutionary processes. Many popular educators in Latin America thought the same, and so did those – paradoxical as it may appear – who devoted their lives to preventing these educators, at all costs, from achieving their aims. If those who promoted liberation suffered repression, as the thousands of Brazilian university students imprisoned during

the first years of the dictatorship can bear witness, being a popular educator, putting these ideas into practice, was no easy matter either. In Sandinista Nicaragua, thousands of popular literacy teachers mourned seven of their number murdered by the counter-revolution; popular educators like the Paraguayan Martín Almada were persecuted, imprisoned and tortured simply for "educating for liberty".[15]

From the moment when a section of the dominant sectors took away their support for his experiment in Angicos, Paulo Freire knew that he had crossed the line which divided charity workers from revolutionaries, and he chose to go on. He believed that the current situation could not continue; and if he was wrong, he preferred to be wrong on the side of the oppressed. Any other choice would have meant truncating his spirit: forgetting the child who refused to believe that another child's hunger was normal, silencing the young man who could not bring himself to accept that nothing could be done to change injustice.

Paulo Freire never applauded the wild optimists who thought that education was the key to solving every problem, just as he never accepted the position of the disenchanted who saw in education the root of all evil. There was not one education, he felt, but many. There was no neutral education, he declared, for all were conditioned by and contributed to different conceptions of reality. The only thing to be done, and what he did, was to work tirelessly to reinforce what he considered to be the best and fairest option. His choice fell on that education which the popular sectors were starting to create for themselves, which could support the processes of social transformation occurring across the continent. His legacy was the teaching that thought alone did not transform reality; to do that it was necessary to practice liberation education, to struggle for revolution, and most important of all, to love.

Notes

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6 Ernesto Guevara and the Role of Education in Revolutionary Processes*

Ernesto Guevara the Autodidact

Studying the ideas of Ernesto Guevara is not just a way of "settling accounts with the dreams of a generation which sought to take heaven by storm", as the Brazilian political scientist Emir Sader put it so clearly; it is also an ideal point of entry for tracing the notions on education shared by so many Latin American revolutionaries from the mid-20th century onwards.[1] Assuming this potential, and avoiding sterile glorification, on the one hand, and futile demonisation, on the other hand, in this chapter we will systematise some aspects of Guevara's thought in order to reflect on the role that education assumed, or could assume, in revolutionised societies.

From the days when he learnt to read in his native Argentina until his death in a small rural school in Bolivia, Ernesto Guevara always understood that studying was anything but a nuisance. This was what he meant, for example, in a letter to his wife Aleida in 1965, when he wrote that he had "become so used to reading and study that it has become second nature".[2] What was study, this second nature, for him? To appreciate how he was able to understand study as a duty, a necessity and a pleasure all at the same time, we will distinguish three essential components in his particular manner of learning: reading, writing and travel.

Ernesto Guevara suffered asthma as a child, which prevented him from attending primary school regularly. As a result, his mother, Celia, assumed the responsibility of teaching him his letters, and then devoted her efforts to stimulating him to read. These efforts were undoubtedly seconded by the library of more than three thousand books available in his parents' house, and by the fact that the family lived in a society which had inherited the best educational efforts of Domingo Faustino Sarmiento. He never lost the habit of reading.

Writing came to him from his early observation of his parents, who recorded in great detail all of their son's activities during the day to identify the factors which exacerbated his breathing difficulties; from this he learnt the value of systematic note-taking. As a teenager he started to make notes on his reading, a practice that he would later extend to his

travel experiences and, finally, his guerrilla campaigns. He wrote so as not to forget, so as never to repeat a mistake, to achieve greater depth in his thought, and of course to communicate his findings, learning and/or new understandings.

His passion for travel was connected with his desire to incorporate into his mental map people's ambitions and afflictions, as well as the landscape that they inhabited. In 1951 he went on a trip that took him to different parts of Argentina, Chile, Peru, Colombia, Venezuela and the United States. In 1953, he left Argentina again to explore Bolivia, Peru, Ecuador, Panama, Central America, Mexico and Cuba. And it was from Cuba that he travelled in the 1960s, as a representative of the government, to dozens of countries in Africa, Asia and Europe.

Ernesto Guevara enjoyed an excellent education, for he studied in one of the most highly reputed secondary schools in Córdoba, Dean Funes School, and then in the prestigious University of Buenos Aires. For the purposes of the present work, however, it is more appropriate to follow the views of the Cuban educator Lidia Turner Martí and understand him as an autodidact.[3] This is because he did not limit himself to what the school system offered, nor did he expect it to provide him with all he needed to satisfy his preoccupations.

His particular manner of confronting reading, writing and travel reflect a sort of educational sovereignty or autonomy only found in autodidacts. It is revealed, for example, in his urge to promote self-teaching seminars with his colleagues in the Industry Ministry in Cuba. This quality is also apparent in a brief dialogue that he held with Salvador Villaseca, his private mathematics teacher during the years when he served in the Cuban government: after Ernesto Guevara had successfully learnt some basic subjects like algebra and trigonometry, and advanced through more complex subjects like differential equations, he surprised Salvador by asking if he could learn linear programming or mathematics applied to economics. In fact, he wanted to go on discovering new fields. The teacher was obliged to refuse, for he had already taught his pupil all that he knew. Far from being discouraged, Ernesto Guevara replied: "It doesn't matter, we will study together".[4]

But despite the immeasurable store of knowledge that he acquired through his particular manner of studying, the most important was what came in the long run to form the central core of his knowledge: he discovered the misery in which people lived in the so-called underdeveloped countries; he understood that behind this condition there were people interested in perpetuating it, and that his identity as a human being made him the brother of all the oppressed. In a speech to the General Assembly of the United Nations in 1964 he referred specifically to this posture:

> I was born in Argentina; that is no secret to anybody. I am Cuban and I am Argentinian; and if the most illustrious gentlemen of Latin America will not take offence, I feel myself equally a patriot of the

> whole of Latin America, of any country in Latin America, and as great a patriot as any. And if the time came, I would be ready to lay down my life for the liberation of any country in Latin America, without asking anything of anyone, without demanding anything, without exploiting anyone. And this state of mind is not limited to me as the temporary representative of Cuba in this assembly; the whole Cuban people feels exactly the same way. The whole Cuban people vibrates every time an injustice is committed, not just in the Americas, but anywhere in the world.[5]

Violence and Pedagogy in Liberation Struggles

Just as Ernesto Guevara was ready to lay down his life for liberation, he was ready to take the life of anyone who stood in his way. This was another of the lessons that he learnt outside the school system, in the "University of Life" as he liked to recall.[6] It was in late 1954, in a Guatemala that was being harassed implacably by the United States Empire, that he began to understand unequivocally that the revolutionary process could only triumph and defend itself by force of arms. By the middle of 1955, he had joined the expedition commanded by the brothers Fidel and Raúl Castro, who shortly afterwards undertook the liberation of Cuba by armed revolt. What were the arguments that convinced him to take up arms? What reasons could lead him, like so many others, to consider another human being as an enemy to be shot? Was there no other way to attack the misery, to put an end to imperialism, to defend the oppressed?

Before we attempt to answer these questions, we must remember that the world that Ernesto Guevara knew was marked by wars and violence. For him, as for many, memories were still fresh of the war between Bolivia and Paraguay, the Spanish Civil War and the two World Wars. There was also the series of armed liberation struggles which had been fought in many European colonies since the mid-20th century. Nor was it easy to renounce the way of violence when it was being exercised openly and with impunity by dictatorial governments like that which finally won power in Guatemala, or those which controlled the Cuba of Batista, the Haiti of Duvalier, the Nicaragua of the Somoza family, the Paraguay of Stroessner or the Dominican Republic of Trujillo.

However, we all know that the fact that war and violence are in the air is not sufficient reason to pick up a rifle and head for the jungle. People embraced violence because they understood that oppression was in itself tantamount to rape, as the Martinican Frantz Fanon expressed it, because it would only succumb "to greater violence".[7] It was this reasoning that led Ernesto Guevara to maintain one of the conclusive arguments for deciding on how to act, which was that ending domination by force of arms was less costly, in human lives, than pursuing liberation by obstinate and ingenuous pacifism. This conclusion makes more sense

considering that the object of the revolutionaries was never to gain one or two more seats in parliament, or to lose another election by a smaller margin, but to avoid the snares of legality altogether and concentrate their efforts on strategies which would be most efficient on balance.

There were many others who reasoned in the same way and decided to join the ranks of the guerrillas, particularly urban youths who saw no other way forward in the current situation – many of whom belonged to the emerging middle sectors of the population and had enjoyed a much better than average education. There were many more, particularly from the popular sectors, who joined on account of more tangible concerns; or reckoned that it was better to go down fighting than perish under the heel of oppression; or found that war had been declared in their home areas, forcing them to choose quickly between one side or the other before worse befell them.

Having outlined the reasons that led many to take up arms, we are now in a position to study the role that Ernesto Guevara assigned to education in liberation struggles. When young Cubans joined the Rebel Army, they also signed up to the rebels' training processes, the aim of which was to give them a moral flag to fight for and a minimum of knowledge to improve their chances of victory. The guerrilla fighters, in planned training or in their free time, learned to shoot, studied the enemy's fighting abilities and became familiar with the main features of their surroundings. In addition, they were given classes in literacy and general culture, and taught a second language. The better consolidated the rebel force became, the more systematic were these training exercises. In March 1958, more than a year after the start of the campaign, Ernesto Guevara himself assumed the responsibility for managing a Recruits' School for the Rebel Army, to which a second school was added soon after.

The guerrilla force also organised educational experiments for the local population, not least to explain to them the reasons for the struggle. Witnesses have since declared that it was thanks to the guerrilla fighters that many of the peasant population saw a school for the first time. Meanwhile, it was Ernesto Guevara who stressed that everyone involved in school benefited, because while the revolutionaries taught the importance of the armed struggle, the local people gave more meaning to the struggle by publicising their concrete necessities.

Ernesto Guevara did more than just participate actively in these training activities. When each campaign ended, with victory in Cuba or defeat in the Congo, he sat down to examine, analyse and systematise the notes that he had made in his diaries in order to extract the lessons learnt and transform them into teaching material.

Although inertia might suggest otherwise, this urge to analyse was not altruistically motivated, in the sense that he did not propose to offer disinterested help to anyone else with his writings. They were a logical

product of his particular way of understanding the relation between intellectual work and militancy. He understood that the situation would not be transformed by repeating what had been done in the past; and nor would it change because of all the good reasons that justified change. There was no alternative but to think and fight at the same time. This conception explains why he never had to ponder the question which troubled so many intellectuals in those years as to whether they should abandon letters and embrace the armed struggle. For him the pen and the rifle were not mutually exclusive; both were indispensable, and both formed part of his fighting equipment.

His writings, seen from a different perspective, can also be understood as a concrete expression of the Cuban government's policy of encouraging the guerrilla war in Latin America. This policy rested on the openly held conviction that liberation was impossible without armed confrontation, and the belief that socialism in Cuba would have a greater chance of developing its full potential if there were more centres of guerrilla activity attracting the attention of the United States – distracting it from its siege of the island – and more liberated territories with which the revolutionary government could extend its international alliances.

The intention here is not to suggest that guerrilla warfare did not exist as a liberation strategy before the Rebel Army, or that after its triumph in Cuba all the guerrillas in Latin America were directly influenced by it; the point is that after the rebel victory, the Cuban government followed an explicit policy of disseminating its experience, with Ernesto Guevara assuming the role of guerrilla-master.

By following this intellectual practice of studying his notes, Ernesto Guevara learnt at least three vital lessons. The first was that to start a revolution, there was no need to wait until all the right conditions were in place. The very struggle could create them by convincing people how important it was to take up arms, and then ensuring that the correlation of forces was increasingly in favour of the rebels. Thus, the guerrilla campaign would act as a sort of accelerator of social contradictions, unmasking the intentions of the contending forces, and at the same time forcing the population to align with one of the two sides.

The second was the demonstration that popular forces could beat a professional army because they had greater moral strength. This was because government soldiers operated as simple mercenaries, in the sense that they were only prepared to risk their lives more or less in proportion to their salaries, whereas the revolutionaries gave everything they had in combat because they were fighting with a moral integrity which made them feel as if they were "the highest rung of the human species".[8] It is this which for most people explains the decisive victory of the Rebel Army at the end of 1958 in the town of Santa Clara, where only a few hundred guerrilla fighters, led on this occasion by Ernesto Guevara, faced several thousand better-equipped soldiers.

And third, he concluded from his own experiences that experience as a guerrilla fighter was the best school for a revolutionary; or put the other way round, that the best revolutionaries – the *cuadros* as they were called – were formed in combat. The corollary of this assertion was that priority should not be given to education, that the precious time of guerrilla fighters should not be consumed in systematic education initiatives – a conclusion that was only admissible, as the Cuban experience showed, if the revolutionaries held a large area of liberated territory where they could implement recruit schools. One of the intellectuals who was closest to the Cuban Revolution, the French philosopher Régis Debray, expressed a similar idea when he said that the right path for Latin America was guerrilla warfare – not building up parties, not contesting elections, much less (extrapolating from these activities to our area of interest) experiments in liberation education.[9]

The Role of Education in Revolutionary Processes

What role did Ernesto Guevara reserve for education in the consolidation phase of the revolutionary process? Would it continue to be of marginal importance, as in the liberation struggles? On 1 January 1959, he himself probably did not imagine the importance that education would acquire. However, as he found himself taking up the challenges of giving life to a revolution, he quickly came to understand that it was one of the key pieces of the apparatus needed to create the "new man" that the revolution dreamed of.

The majority of Latin American guerrilla fighters, especially those who saw themselves as part of the Vanguard, understood that the armed struggle was no more than a means to the end of obtaining power in the country in order to effect the transition to socialism which was a step on the road to communism. The object of the struggle, therefore, was not just to carry out another *coup d'état*, or bring down the current dictator, but to set up the ultimate dictatorship, the dictatorship of the proletariat, which would give birth to a new society where every citizen's basic needs would be satisfied and they would be free of exploitation and alienation (in the sense attributed to the word by Karl Marx).

In Cuba, as in all societies which set themselves such lofty goals, there was little agreement on how to consolidate socialism, and how to arrive, as quickly and painlessly as possible, at a communist society. In the first decade of the revolution, for example, while some maintained that the first priority was to promote structural changes in the economy in order to propagate the desired changes to other areas, others postulated that changes needed to be introduced simultaneously in all spheres. On a more concrete plane, the argument raged between those who thought that it was impossible to do without material incentives to overcome absenteeism from work and to promote productivity – cardinal problems

for Cuba in these years – and those who thought that the workers' motivation should be founded basically on moral stimuli, i.e. on congratulations, applause and any other mechanism that created in people the deep conviction that it was their duty to give of their utmost in the common good. Speaking in support of the latter option, Ernesto Guevara declared:

> It doesn't matter how many hours you work, it doesn't matter how much you are going to earn, it doesn't matter if you get paid a bonus; what matters is the moral satisfaction of helping to make society greater, the moral satisfaction of giving something of yourself to this collective task, and of seeing how, thanks to your work, thanks to this little piece of individual work, one of millions and millions of pieces of individual work, a harmonious collective work is created, which is the reflection of a society that is moving forward.[10]

Guevara was so vehement in defence of this position that he even claimed, in July 1963, that economic socialism did not interest him if it was not accompanied by communist ethics. He was not interested, so long as the fight was carried on against misery, and at the same time against alienation. The two struggles were inseparable.[11]

Two things that the Cuban revolutionaries could agree on were that the State was to be the great actor in society, and that education should be given unprecedented importance. These were two trends that had been present in Latin America since the beginning of the 20th century, and became particularly evident in these years in many ways, not least in numbers: investment in education was growing spectacularly in every country in the region, and at the same time the numbers of both teachers and pupils were growing. This importance was reflected also in the increasingly significant efforts of states to organise educational agents and agencies into a single national system, and in the initiatives which sought to reform these systems to allow school matriculations to reach a broader range of society.

The populations of Latin America, in harmony with these efforts made by states, placed an increasing value on education, and Ernesto Guevara is a good example of this tendency. He planted in the minds of those nearest to him the idea that they should not neglect their studies; and he was capable of blackmailing his subordinates, warning them that they needed to improve their educational level if they wanted to be promoted. And this was the appreciation that he manifested in 1965 when, in his official leave-taking from Cuba to take up new challenges, new struggles, he said: "To my wife and children I leave no material goods, and [...] I ask nothing for them because the State will give them enough to live on and provide their education".[12]

In the case of revolutionary Cuba, one of the first visible signs of the importance that education would assume appeared when, a few months

after the rebel victory, the government started to turn all the military forts into schools. This happened in Havana with the principal military bastion of the dictatorship, Campamento Militar Columbia, which in September 1959 was given the new name of Ciudad Escolar Libertad [Liberty School City]. This measure, responding to the need to get rid of anything that might be destabilising or counter-revolutionary, sought at the same time to give a signal that the struggle did not end with military victory, but would continue on other fronts.

A further move in the same direction was the suppression of private education in June 1961. This was more an expression of the ancient battle between church-sponsored and lay education, showing that the revolution intended to abolish the parallel systems that existed in the island – as throughout Latin America. It was a victory over the model in which there were schools for the rich and schools for the poor; it was a triumph which brought about, for the first time on this side of the world, a thesis postulated decades earlier by the Peruvian José Carlos Mariátegui: one State, one revolution, one school.[13]

Another indication which agrees with these trends was the implementation, also in 1961, of an ambitious Literacy Campaign which would mark the start of a systematic policy of extending school cover that continued at least until 1975. The object of the campaign was to teach literacy to the slightly over 20% of the population who were illiterate, mainly country-dwellers. On completion of this campaign, it was succeeded by another which sought to educate the whole population to sixth grade, and then by a third aiming to bring everyone up to ninth grade. Because of all the associated publicity, the Literacy Campaign is very well documented, allowing it to be used to analyse the place given to education in the early days of the revolution.

From a cultural point of view, the Campaign was seen as the first step towards eliminating the differences between the people and the Vanguard. Using the same logic as those enlightened figures of the 19th century who said that the popular sectors should be educated to enable them to exercise their sovereignty, it was understood that once the whole people were incorporated into the Vanguard, society would effectively have become communist, with no social classes and – perhaps – no State. From a cultural perspective also, the Campaign was understood to be a mechanism which would allow every citizen access to the wealth contained in books, which was considered the principal spiritual reservoir of humanity and the greatest fortune to which Cubans should aspire.

From a social perspective, the Campaign was understood as an integration mechanism in which peasants and literacy teachers would learn about the importance of the revolution. As with the links between peasants and guerrilla fighters, the peasants should lay the practical foundations of the revolution, while literacy teachers should construct the argumentational basis. In social terms, too, this Campaign was

conceived as a mechanism to involve young people in the country's future – young people who felt that they owned the revolution, but who had not taken part in the war of liberation. Also from the social angle, the Campaign was probably a way of telling the peasant population that the new government, the People's government, differed from its predecessors because it sent them society's best and noblest, its young people; and this was perhaps the first government policy in the history of Cuba intended to help the peasants to exercise their rights rather than coming to violate them.

From the economic perspective, by incorporating peasant workers into the world of letters the Campaign also sought to insert them into the productive plan adopted in the island, which placed industrialisation at its heart. This is where the importance of education for the Cuban revolutionaries can be seen most clearly, since although it was assumed as a high priority, it remained subordinate to economic matters. In other words, education was not valuable for its own sake, but precisely because of the way it related to economic processes. This was the concept that Ernesto Guevara transmitted in an official tour that he led to Uruguay in 1961, where he stated that the funding provided by the Alliance for Progress should not be assigned to social or cultural areas, such as building more schools, since that would enhance the state of dependence in the region. What must be done, he said, was to invest those resources in the construction of industries that would generate wealth, which could then be used to satisfy non-productive needs. His words are very clear:

> A development programme which starts with the number of schools, houses or roads that will be built is unreal. Social development is indeed indispensable, and it is what we are all fighting for. In practical terms it is ridiculous to think that we are going to fight for simple economic development, and that economic development is an end in itself. It is not.
>
> Economic development is nothing more than the means for achieving an end, which is the dignity of man. But to achieve this end we must produce; because if we start to build houses before we build cement works, there will be no wealth to allow the houses to be occupied, there will be no work for the man who lives there, there will be no guarantees that this man's family, who have been given a house, will be able to eat every day thanks to the work of his hands.[14]

The same thought underlies these words:

> There is one subject I would like to dwell on for a moment, and that is education. We laughed at the group of technicians who said that education and health were a *sine qua non* for setting out on the road

> to development. For us, that is an aberration; but it is no less true that once we have set our foot on the road to development, education must march on a parallel course. Without proper technological education, development will be held back.[15]

When Ernesto Guevara was at the head of Cuban institutions like the National Bank or the Industry Ministry, he could take his time and extend his understanding of the economic importance of education. He reiterated, in the most diverse circumstances, his conviction that it was not indifferent whether one studied or not, just as it was not indifferent whether one did well or badly. He considered studying to be an imperative duty, because Cubans needed to know how to use technical knowledge to achieve revolutionary objectives. The more knowledge they had, the more and better products they would produce. This reasoning agreed with those who sought to establish a closer familiarity between education and work. This familiarity would translate, on the one hand, into a feeling in students that work was not an obligation or a punishment, but a pleasurable activity insofar it was understood – and felt – as essential for constructing the well-being of the members of society; and, on the other hand, it would lead workers to understand that study was not something foreign, boring or irrelevant, but an activity capable of providing tools which would help to improve understanding, and contribute to perfecting practices.

These ways of understanding the links between education and work went beyond mere intentions and came to life in various projects, like those ideas for transforming educational institutions so that they would also serve as factories, and vice versa. This was the spirit, for example, behind certain experimental initiatives in education implemented in the Cuban countryside which aimed, among other things, to make these projects self-financing through the sale of produce generated by the educational community. And this was the backcloth to some of Ernesto Guevara's reflections that workers should dedicate a little more time to their education every day, but without this resulting in a drop in production – which ought on the contrary to increase.

Ernesto Guevara, as the economic chief of the island, also had to reflect urgently on the relationship between universities, government and revolution. This was because after the overthrow of Fulgencio Batista, the "brain drain" to the United States, something that was and remains usual in Latin American countries, accelerated sharply as technicians – and better educated people in general – tended to flee the country. They probably thought that communism was not their cup of tea; that the dictatorship of the proletariat was not ideal scenario in which to develop their interests, and they went … In an attempt to reverse this situation, and to get both teachers and students to commit themselves to the new Cuba, between October 1959 and March 1960 Ernesto Guevara held

meetings with the island's three universities to expound the arguments which, he thought, would dissipate the tensions between them and the new government. This was a challenging task, especially as some of the students defended their freedom to choose how they would like to work in their future careers, which they considered to be non-negotiable. In reply Ernesto Guevara hinted that those who did not comply with the dictates of the revolution would be considered reactionary elements, counter-revolutionaries, or even traitors.

None of the three meetings was easy. Extending an invitation which at times looked more like intimidation, Ernesto Guevara tried to put across his idea that education was a reflection of society, and that the universities were under an obligation to accompany the process of change that was being tried out in Cuba. He added that close coordination was necessary between government, State and universities, and that the latter had a vital role to play in the technical aspect of the revolution. He also reminded them that the only institution that knew the country's needs, and therefore established economic plans, was the government. And to make his point still more clearly, he underlined that if the government decided that more technicians were needed to industrialise the country rapidly and the universities insisted on focusing on training liberal professionals, sooner or later the system would break down and the universities would be shown up very badly. After all, he said, it was the State who financed them, and they could not use public money just as they pleased.

He produced a large number of arguments to try to overcome the resistance of the university community. He told them that they were in a privileged position, because while there were arguing, the people were working to allow them to argue. He warned them that the universities could not go on being an expression of the old hegemonic class, and that meant that they must open their doors to the classes which had historically been marginalised, to those who were not the same colour as the elite, to blacks and mulattos. And he reminded them, as some years later the leader of the Chilean revolution, Salvador Allende, reminded young Mexicans, that the road to revolution did not go through university; that more important than tucking an incendiary book under their arm was to be consistent with the ideals of justice and equality. At heart, Ernesto Guevara, like Salvador Allende, believed that the universities should answer to the people.[16]

The controversial tone of Ernesto Guevara's discussions with the university communities was echoed shortly afterwards in Fidel Castro's words to the island's intellectuals, when the Cuban leader coined the maxim: "within the revolution everything, against the revolution nothing".[17] The import of this maxim seems to be that the most relevant thing was to put the people as the first and only priority, relegating to a lower level many other characteristics previously considered desirable in an intellectual, such as honesty, critical spirit or commitment.

For Ernesto Guevara this answering to the people was not synonymous with expecting intellectuals to be docile to official thinking to the point of proclaiming, in a show of unbounded loyalty to the revolution, that capitalism was finished. Nor was it a free pass for them turn their backs on matters of national interest, drawing grants funded from public resources to finance work of doubtful social value. What he asked of university personnel, as Fidel Castro demanded of intellectuals, was simply that they should abandon their individual pretensions and place themselves at the service of the common good. Which meant, in the context of these words, placing themselves at the service of the representatives of the revolutionary government.

Education and Social Transformation

After a decade as an active revolutionary, Ernesto Guevara did not limit his reflections to the arguments necessary for liberation wars, what a guerrilla fighter should carry in his pack or the advantages of a guerrilla war as a strategy to defeat the enemy. In *Socialism and man in Cuba*, published on 12 March 1965 by the Uruguayan weekly *Marcha*, he reflected on how to construct this "new man" who would be capable of putting the interests of the collectivity above his own; how to achieve a society in which there were neither dominators nor dominated.

The very presence of these concerns more than five years after the imposition of the revolutionary government reflects the fact that military victory alone was not enough, nor were all the efforts made to date in any area, including education. It was not enough to convert barracks into schools, to prohibit private education, to extend education cover – not even all these things together. What was needed, he thought, was to find a way of creating the enthusiasm, the sacrifice and the selflessness – which were kindled automatically in combat with the enemy – in less exceptional moments; a way of maintaining at all times the companionship that sustained guerrilla fighters in the mountains, or the feeling of being part of a collective action that uplifted those involved in the literacy campaign. For it was those feelings, he understood, that turned a citizen into a revolutionary, as expressed in his own definition:

> When every man or woman can fight in his trench without needing to see the soldier at his side, when you know that it is so important to achieve an innovation in production, or help a comrade who has fallen behind to catch up, or teach – if you are already a technician – a new pupil who knows nothing to bring him or her up to your level; when you know that all these things are just as important as fighting to defend your homeland with a rifle, or with a weapon in a trench, and when you know that it is all part of a single struggle, a struggle to the death against imperialism, a struggle that will not

> and cannot have any other outcome than the total destruction of imperialism, and it is a struggle in which there are many fronts, and we must defeat imperialism on all those fronts; when you understand all these things perfectly, when they are not just words that you accept but part of how you act, then you can really say that you are revolutionaries.[18]

To rise to this huge challenge, to create revolutionaries, the formula he dreamt up was simple, at least on paper. It was to convert society in its entirety into a huge school focused on inducing, through rational means, those valuable qualities which could be achieved spontaneously by emotional means. Taking this interpretation a step further, it required deployment of a strategy which would raise people's consciousness to the point where they would act permanently, without the need for external stimuli, under this emotional state which moves revolutionaries to commit themselves to the fate of the collectivity. Only in this way could one assume as a personal affront any injustice committed against any other person, anywhere in the world.

It must be noted that when Ernesto Guevara talked about converting the whole of Cuba into a school, he did not mean that the school system should expand to take in the whole island. Rather he was imagining a type of education that used various channels to reach people's consciousness. What he meant was that these attitudes should be reinforced by state institutions such as schools and the media. He also meant that people themselves, as they started to incorporate these lessons, should apply social pressure on their peers, motivating and/or convincing by their example those who had not yet learnt. He meant too that every individual, in his or her search to satisfy the expectations of society, should gradually adapt to the point where they acted in the interests of the collectivity without the need for external motivation. These three paths were what he meant by direct education, indirect education and self-education, respectively. The words cited below give a clearer idea of these understandings:

> In our case, direct education acquires a much greater importance. The explanation is convincing because it is true; it does not require subterfuge. It is exercised through the state educational apparatus as a part of general, technical and ideological culture, through organisations like the Education Ministry and the party information apparatus. Education takes root in the masses and the recommended new attitude tends to become a habit; the masses adopt it and pressure those who have not yet been educated. This is the indirect way of educating the masses, just as powerful as direct education.
>
> But the process is conscious; the individual continuously receives the impact of the new power of society and perceives that he still

> does not fit in with it completely. Under the influence of the pressure of indirect education, he tries to adapt to a situation that he feels is just and that his own insufficient development has prevented him from accepting so far. This is self-education.[19]

Was this confluence of discourses sufficient to get people to adopt and accept as their own a different way of being, of feeling reality? Is it even possible to achieve this acceptance? We still have much to learn about the possible and the impossible, especially about what has occurred in these decades of the Cuban Revolution, and the teachings left behind by the Latin American revolutions which failed to become consolidated, as in Chile, Grenada and Nicaragua. The important point here is that by studying Ernesto Guevara's reflections on education we can observe a revolutionary process from the inside, obtaining a view which is both more complex and free of myth than is possible from listening to what official organisations tell us – be they governmental or multilateral – or what we can learn from other agents who were never really committed to socialism.

Studying Ernesto Guevara's conceptions of education, studying ourselves in them, reflecting on what they tell us, helps us to understand that while education is indisputably important for everyone, its importance changes according to the role assigned to it in the development process. For example, while for some, like Paulo Freire, education can help to raise in the minds of the oppressed the consciousness needed to motivate them to struggle, for others, like Ernesto Guevara, education does not play any important part in liberation processes – although it is important in the revolution and in the consolidation of the political and economic changes won through emancipation.

Studying Ernesto Guevara's ideas on education also shows us, above all those of us who have become accustomed to claiming that education is the infallible solution to practically every problem, that liberation and revolutionary processes without a material basis are no more than a chimera. This does not mean thinking that education is irrelevant, but understanding that it is more important to achieve liberation, and more important still to live in revolution. Just as every popular educator teaches that not all education is equally desirable, Ernesto Guevara taught that implementing a revolutionary education requires the material conditions in which it is possible. Education is important, certainly, but more important is the independent capacity to generate wealth with which to give education the desired direction. This understanding was present in the ideas of one of the founders of contemporary Latin American thought, the Cuban José Martí – who also rose in armed revolt at the end of the 19th century. Among other motives, he was convinced that it was essential to fight for the second independence of Latin America, since political emancipation was of little use if it was not accompanied by economic sovereignty.[20]

Is it mad to demand the same educational benefits for the whole population? Is it unrealistic to try to make educational institutions self-financing? Is it too much to ask the universities to make solving the practical problems of the majority their main concern? I believe that many people would agree on the answers to these questions. And yet why, if a broad consensus exists on these issues, is it so difficult to put them into practice? Why can we only ask these questions by studying those who took power by force, and defended these ideas by the same means? Are there people who have an interest in maintaining injustice? Is there no means but the rifle of putting an end to all violence, preventing death, sowing life? The purpose of these words is not to provide answers, but merely to offer some tools for thinking about the role of education in social transformation from other points of view; and in this way help to reassess the achievements of all those who, like Ernesto Guevara, not only aspired to a better world, but gave everything they had to achieve it – everything.

Notes

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Part III

7 Education and Social Transformation in Latin American Thought*

I

In the mid-20th century, reflecting on the links between education and social transformation needed no justification. The misery and the violence which were the scourges of Latin American societies meant that for a large part of the population, perhaps a majority, basic changes were both imperative and urgent. And this belief drove them to explore every path by which change might be achieved, not least education. When the struggle for hegemony started to go the way of neoliberal policies, at the end of the 1970s, it became increasingly difficult to address systematically the question of how to produce a profound transformation in society. Despite this discouraging scenario, today, in the early part of the 21st century, there are still many people with a lively interest in examining these questions, especially people who work with the popular sectors and who wonder – like many teachers, public employees and a multitude of social workers – what steps could take us in the direction of a juster society. It is to them that these words are addressed.

In full knowledge that there are many ways of thinking about the links between education and social transformation – and without wishing to detract from other possible approaches – the course chosen here has been to address them from the contributions made by Latin American thought in the mid-20th century. This option may be assumed to offer two great advantages: it allows us to capture a moment in time when reflection on these matters hung in the balance; and it enhances communication between all those who find in the ideas of those decades some of the principal underpinnings of our convictions today.

By way of introduction to Latin American thought in those years, the analyses presented here have focused on the contributions of three well-known intellectuals: the Austrian-Mexican Iván Illich (1926–2002), the Brazilian Paulo Freire (1921–1997) and the Argentinian-Cuban Ernesto Guevara (1928–1967). These thinkers have been chosen because they can be understood as especially representative and influential, not least because they are holistic and accessible.

The holistic character of their ways of understanding the issues was acquired thanks to their persistent concern to make sense of the fruit of

their reflections, to set their ideas in their political and economic contexts, and not to lose sight of how they could be developed or applied in practice. All these qualities distinguish them from the many social scientists who tended to operate without clearly defining the ends to which they hoped to contribute.

Their understandings were accessible because they were uttered in the same language used by those who went out of their way to pursue social transformation, meaning that their readers felt included in their line of argument. They acquired this sensitivity by becoming actively involved in the intellectual networks of their time; and more importantly still, by immersing themselves in the problems and the aspirations of the population of Latin America.

All these characteristics meant that their works were as original as they were relevant, and as stimulating as provocative. It must be noted, however, that in the heat of the fierce battle of ideas which enveloped the whole region during those decades, their positions were unable to dialogue even with those postures which can be understood to be closest to them in political terms. In the long run, this situation tended to isolate them and was one of the reasons why the perception spread that their ideas were unique or exceptional, a perception that has grown ever stronger with the mantle of disrepute that neoliberalism has tried to cast over everything associated with profound or revolutionary changes.

In the light of these facts, creating a dialogue between the postulates of Iván Illich, Paulo Freire and Ernesto Guevara will not only enable us to find that they agreed in their purpose of building a better future for the population as a whole (including the oppressors), in their conviction that revolution was urgently needed and in their understanding that education had an important role to play; it will also allow us to appreciate that they disagreed on how these goals should be achieved and – most interestingly – on how education could contribute to them.

II

In texts like *Towards the end of the school era,* Iván Illich expounded the essence of his proposal that schooling was a hindrance to any substantial transformation of society. Thus, if anyone wanted to contribute to this noble aim, an essential step was to do away with the school system, more specifically with compulsory schooling. These ends were very different from wanting to destroy education, as many careless readers have suggested, or to dismantle the school system, as ill-informed critics have proclaimed.

Iván Illich understood that the school system could not foment significant transformation because it acts entirely as a function of industrialisation. It is this mode of production, in both its capitalist and socialist variants, that is finally responsible for all oppression. He understood that

school was the cultural factory *par excellence*, since there the teachers – the workers in this analogy – supplied the pupils with standardised contents, using normalised methods, in order to pursue an unvarying object: to make them good consumers of industrial goods and services.

Putting an end to the school system, therefore, would at once put an end to this instrument for legitimising an oppressive economic strategy and allow the construction of a different education system. One which would not seek to install attitudes intended to encourage unceasing progress and an abundance of material goods, such as competitiveness or individualism, but which would aim to satisfy the pupils' particular interests and, in the final analysis, sow the seeds of a desire to live well, rather than 'better'.

How could these ideas be brought to fruition? Although Iván Illich understood that industrialisation could be questioned from a number of angles, he also realised that an approach through education offered the best chances of success. And it was precisely in education that the contradictions of industrialisation could be seen most clearly. One of the factors on which his ideas were based was that university students were turning out in these years to be among the most active agents in the struggle against models that they condemned as oppressive, to the point that several revolutionary organisations in Latin America counted large contingents of students among their ranks. Nevertheless, he himself declared that change could not be wrought from inside the school system, but by raising people's consciousness to enable them to understand the mechanisms by which they were constrained. This step was observed to be fundamental in the construction of a different system of education, oriented towards procuring people's happiness without paying attention to the interests of institutions, factories or markets.

Paulo Freire, meanwhile, postulated that education, whether in a school system or not, could contribute to a profound transformation of society. Nevertheless, he insisted that there was no single way to educate, and that the alternatives differed as much in their means as in their ends. In some cases, the object was to serve the interests of the dominant sectors, helping to preserve the *status quo* and discouraging any indication of rebelliousness, taming its participants. In others it was to support the struggles of the popular sectors, strengthening ways of understanding society which invited people to participate actively in processes by which the structures of domination could – it was hoped – be destroyed.

In works like *Pedagogy of the oppressed*, Freire proposed that what had to be done was to strengthen the experiences of popular education, those initiatives promoted by the popular sectors themselves to obtain education, as a way of raising consciousness in people of how vital it was to become involved in the struggle against oppression. More specifically, he understood that in this way it would be possible to unmask the mechanics of domination, to denounce the strategies used by

dominant sectors to perpetuate the unjust order of things, and at the same time to uncover the inconsistencies of those who claimed that they wanted to contribute to the emancipation of the popular sectors, but in fact did the opposite. The latter, the sectarians as they were called, ended up discouraging active participation in social issues by their show of knowing precisely how the future would be. They either transmitted the conviction that whatever people's individual actions, they would not affect final result, or else proclaimed that triumph was inevitable, and would occur independent of any individual efforts.

Paulo Freire also understood that if oppression flourished, popular education should help to create the subjective conditions which would move people to join liberation struggles, as occurred in Brazil with "The basic reforms" or in the Chile of the "Revolution in liberty". Then, once the chains of domination had been burst and structural changes were in place, popular education should fuse with the national education system to defend and expand the gains made, as proposed in the revolutions of Nicaragua and Grenada.

Ernesto Guevara also believed that the cultural dimension was important in social transformation processes, and understood that this dimension would play a different role at different moments in the popular struggle. Thus, he conceived that education was of secondary importance in the liberation stage, restricting it to teaching the arts of war or establishing bonds of confidence between guerrilla fighters and the local population. Once society was liberated, however, once the revolution was under way, it would acquire a vital importance in smoothing the way forward by forming an appropriate symbolic platform for the new direction taken by society.

His experience in government would teach him, as he says in *Socialism and man in Cuba*, that the fundamental point was that education, like all the cultural initiatives promoted by the revolutionary government, should help to create in people those states of mind which would encourage them to put the interests of the collectivity above their individual interests. In a word, it should form this "new man" who would give life to the "new society". And in that task, he insisted, nothing should be left undone; the whole education system should be oriented in that direction, every means of communication used, and of course, those in control should teach by example.

For Ernesto Guevara, structural transformations could only come after military victory. This was not to say that peaceful means – like liberation education – had no place in struggles for liberation, but to remind people that peaceful means alone could not guarantee success. In other words, he believed that it was necessary to advance as far as possible down the paths of peace, but at the same time prepare for war. Because the Empire, and its local allies, would never give up a position without a fight; they would resist with every means at their disposal, including violence.

To understand clearly the importance of education for Ernesto Guevara, it must be borne in mind that he saw ensuring the political and economic independence of Latin American societies as the priority. Only when those objectives had been achieved could efforts be directed to enriching the people's social or cultural levels. This is not to say that politics or economics were ends in themselves, for he maintained emphatically that the final object was people's dignity and well-being; what he meant was that without control over decisions, without seizing the levers of the economy, there was no sense in thinking about constructing an educational system to serve the popular sectors.

III

As these chapters have shown, these three thinkers focused on related themes which they viewed from similar perspectives; they were in intellectual harmony. Indeed, it could hardly be otherwise given that they not only lived in the same continent and reflected on the same problems, but also based their ideas on related currents of thought which used the same concepts to achieve the same object: liberation.

All this synergy explains how well the best contributions of each of them complemented one another by clarifying the relation between education and social transformation. Iván Illich contributed his critique of the school system, above all by denouncing that the final object of this institution was not to educate pupils, but to insert them passively into the prevailing mode of production. Paulo Freire made a substantial contribution by revealing the existence of a 'pedagogy of the oppressed' to counter the existing pedagogy of the oppressor; this allowed him to maintain that certain modalities of education would be better suited to the interests of the popular sectors, and also to lay the foundations for understanding why not all education is equally desirable. Ernesto Guevara's contribution was to declare that in revolutionary societies, education – as a cultural policy – should teach people to place the well-being of the collectivity above personal interests; in other words, it should teach them to become revolutionary.

Apart from the substantial contributions of each to clarifying different aspects of the problem addressed, their perspectives also have important points in common. One of the most important of these is the well-considered view of each of them with respect to importance of education in the construction of a new society. This sets them apart from all those who, appealing to common sense, declared that education was good or bad in itself. And just as they refused to accept that education was the all-powerful factor, the key to solve every difficulty or open the door to a better future, so they also denied that it was irrelevant to the point that it was not even worth thinking about. They believed that education was important, above all because they were convinced that it could contribute to the construction of juster societies.

Nonetheless, it is clear that other areas exist where they were not in agreement. They differed, for example, in the value that they placed on raising people's consciousness. While for Iván Illich this was something fundamental, because it was the starting point of any liberation process, for Paulo Freire its importance was subordinate to the practice which would grow out of a raised consciousness; and for Ernesto Guevara it only became important after the triumph of the struggle for liberation.

For Iván Illich, raising consciousness was an end in itself, in that the primordial object was to make people conscious of the chains that bound them as the only way of neutralising the power that held them captive. In other words, if the characteristics of schools were known and understood, it would be possible for society to make use of them without being affected by their oppressive dynamics.

Paulo Freire attached importance to raising consciousness, but only as a constituent part of the revolutionary impulse delivered by praxis; that is, as a trigger of actions based on this raised consciousness. He believed that just as initiatives which were not preceded by a conscious thought would not contribute to revolutionary objectives, raised consciousness which was not supported by consistent action would also be ineffective.

Ernesto Guevara believed that while the struggle for liberation had to be won independent of the consciousness of the fighters, once victory was achieved it was vital to reinforce the consciousness of the population as to how important it was to defend and extend what they had won. Only in this way, he thought, could the foundations for the new society be laid.

Another point where he diverged from the other two, probably the best-known, was in his views on violence in the revolutionary struggle. Iván Illich not only considered violence irrelevant for political ends, he justified every reflexive effort needed to deactivate the mechanisms that provoked it. Paulo Freire reflected on revolutionary violence but never practised it. He justified it, as did many preachers of liberation theology, by saying that the violence of the oppressors could not be compared with the violence of the oppressed, as the former was exercised to perpetuate an unjust order, while the object of the latter was to put an end to all violence. Ernesto Guevara exercised violence openly, justified by his understanding that it would always be cheaper in human lives than strategies which aspired to stop the violence of the oppressors by pacific means. In other words, he thought that more people would die of the diseases produced by poverty than would be killed during a straight fight for liberation.

IV

What lessons can be learnt from these complementary, coincident and discordant thoughts? Just as Iván Illich, Paulo Freire and Ernesto

Guevara differed in the roles that they envisaged for education in bringing about substantial changes in our societies, I as author feel a need to distance myself from some of their proposals, especially those referring to the imperious need to raise the people's consciousness. And just as the identity of Latin Americans cannot be described as inappropriate, backward or underdeveloped, nor can the cultural traditions present in the continent be considered inadequate or deficient. Based on this diagnosis, processes based on the existence of people who know and others who do not, or on notions like the Vanguard and/or raising consciousness, are irrelevant.

However, the object here is not to explore the distinctive features of my own understanding, constructed, let it not be forgotten, thanks to the immeasurable contributions of the three intellectuals studied in this book. The important thing is to note that we, like them, must accept that it is fundamental to keep working permanently to dimension the potential of education and to go beyond those views which see it as exclusively good or exclusively bad. We must foster the understanding, shared by the Argentinian educator Pablo Gentili in his *Pedagogy of equality*, that while education may not be the nerve point capable of triggering substantial social changes, it is nonetheless indispensable for achieving them.

Can these precepts be translated into concrete practices? I believe that they can. Every educational and/or cultural practice which aspires to contribute to significant social change may be conceived as a means capable of facilitating reflection among the members of the popular sectors; it can help to organise the context, clarify objectives, clear up misunderstandings and create links between those who are interested in supporting the creation of decent conditions of existence for the population as a whole. Going one step further, we may consider that any educational and/or cultural practice can contribute to deepening understanding of things which at first sight appear indecipherable, regardless of the formal conditioners of such a task – whether it should be paid or voluntary, for example – or of the particular area of action in which it is carried out, be it teaching, research, art or communications. To summarise, it will always be possible to work in subjects that people feel are problematical, to use accessible language which does not divert attention away from the substantive to the formal and to accept that systematic reflection, in its different modalities, is an essential part of solving any difficulty.

Now that we have explored the best inheritance of contemporary Latin American thought, and studied its strengths and weaknesses, we can conclude that education is one more battlefield in the struggle to create a society in which everyone can give of their best to benefit the collectivity as a whole. And although education may not be the decisive factor for solving all the serious problems facing the population, it is nevertheless true that no liberation process which discards education can

make serious progress. Having completed this review of the ideas of Iván Illich, Paulo Freire and Ernesto Guevara, the best we can hope for is that they will continue to provoke questions. And if ever our doubts threaten to destroy our last hope, or deprive our lives of all meaning, we can still fall back on the old maxim that we should carry out our tasks with love, because – as potters teach us – love alone makes a miracle out of the clay.

Note

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