

"The Effects of Revolution on Social Conditions: A
Comparative Analysis of Latin American Countries"

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CHAPTER 1

INTRODUCTION

Scholars have studied revolution from many different perspectives, examining its causes, processes, and outcomes. This particular study focuses on the outcomes of revolution, specifically asking how revolution affects internal social conditions. Political scientists have asked this question before, and their answers have been contradictory, at best.

I am attempting to reconcile some of those divisive answers by testing the two most reliable models available. Model I argues that factors of the revolution itself cause trends in social conditions in the post-revolutionary country, while Model II holds that a revolutionary country's economic position in global terms, commonly one of dependency, is responsible for post-revolutionary social conditions. A brief survey of the most recent literature will show why this study is appropriate and where it fits into the current body of revolution theory.

The different factors affecting revolutionary outcomes that scholars have isolated fall into three general categories: state-level, economic, and individual-level. State-level factors include such variables as the form of government and the strength of the state. The economic factors cover such variables as the level, speed and type of development and the ownership of the means of production. Individual-level factors are concerned with the individual's role in politics and the prevailing social order. For

example, the quality of leadership, human capital, and class structure are human-level factors.

Although scholars have grouped factors affecting social conditions into the above categories, further analysis has created two more general categories, factors of the revolution and external factors. These more general categories somewhat overlap the three mentioned above. Factors of the revolution include variables that represent characteristics of the revolution itself, whereas external factors are variables which represent characteristics of international politics and economics. For example, the behavior of external actors, the level of external debt, and the level of foreign aid are external factors.

The contrasts between factors of the revolution and external factors as explanatory variables has formed the theoretical basis of this paper. The two models which this research examines are derived from these contrasts, such that analysis of each model and comparison of both models should help identify the theory with the most explanatory strength. The following literature review will discuss Model I first.

LITERATURE REVIEW

Model I

An early study of welfare conditions (Echols, 1981) attempted to determine if social equality is best served by socialist or capitalist political administrations. This study examined the issue beyond the variable of class equality to look at the distributions of income and political power. Echols found that there are obvious changes in the early years of a socialist administration, such as property expropriation, reduction of discrimination, and leveling of wages. Class inequalities, i.e., lack of political opportunity and income inequality, are also significantly reduced. However, socialist administrations fail, as have most capitalist/Western administrations, in reducing the more pervasive, societal inequalities of racial, ethnic, regional, and sexual inequalities. Echols concluded that the differentiation between socialist and Western societies occurs across dimensions of inequality, claiming that the underlying cause of these results is ideology and the emphasis which it places on class inequality. This research is valuable to the question I am asking of revolution. If ideology influences social conditions, then one could stretch that analysis and apply it to revolution. Then, the argument would be that the ideology of the revolution and revolutionary government is

the variable causing later social conditions. I will test the accuracy of this hypothesis in Model I.

Kelley and Klein's 1977 study also considered the social effects of revolution. This work classified effects of revolution into short term and long term. Inequality appears as the most significant short term effect of revolution. Kelley and Klein claimed that human capital and status inheritance are the most influential factors, as they determine who benefits, and by how much. They concluded that these resources cannot be redistributed. Consequently, the more human capital an individual has before the revolution, the more benefits he will gain from the redistribution of other resources, such as land and capital. In the long term, revolution causes stratification among the peasantry because the regime cannot offer the only things that can actually improve social inequality, human capital and status inheritance.

This process seems to be inevitable--usually only socialist or communist governments will attempt to intervene. Such intervention requires equalized access to human capital and status inheritance. Reversing this process is nearly impossible to do because the government has no control over status inheritance, and human capital is extremely difficult to equalize across a society.

The authors concluded that the revolution's effect on society as a whole depends on the speed of economic development, the economic position of urban groups and the

post-revolutionary elite, and government policies toward accumulation of resources. The scope of collection of the dependent variable allowed Kelley and Klein to propose short and long term effects of revolution and analyze the processes producing those effects.

Kelley and Klein's work is relevant to this study because it considered both short and long term effects of revolution, and it noted a difference in those effects. Model I of this study examines the differences between post-revolutionary social conditions in the short term and in the long term. In addition, this study will test the influence of external actors in Model II, which Kelley and Klein did not.

Susan Eckstein's study, 1982, is perhaps the most relevant work on the topic. She studied only countries which had "revolutions from below," which are revolutions propelled by a social class below that which holds power. Eckstein compared the cases of Mexico, Bolivia and Cuba, typing all of these cases as cases of revolution from below, to determine the effect those revolutions had on social conditions. Her hypotheses entailed independent variables concerned with characteristics of the country at the time of the revolution and factors of the revolution itself.

Eckstein tested five hypotheses. The first hypothesis, that post-revolutionary social welfare is shaped by world economic position, seems to work fairly well. Eckstein labelled Mexico and Bolivia as a peripheral country and Cuba

as a semi-peripheral country. The terms peripheral and semi-peripheral refer to the country's involvement and role in the global economy. Peripheral countries are said to be those countries which have little independent industrialization and must depend on other countries for consumer goods. Thus, because they are not influential or powerful in the international economy, these countries are said to be on the "periphery."

The results showed that the weak position of less-developed nations in the global economy constitutes an independent restriction on the new government's capacity to improve social welfare; thus, even if a revolution occurs, the government of a less-developed, peripheral country still won't have the necessary resources to improve social welfare. Eckstein noted other independent economic restrictions such as investment-consumption trade-offs and internal economic pressures. Eckstein's conclusions on this hypothesis are strong and indicated that factors of the revolution may not cause social outcomes. Thus there seems to be a lack of consensus in the literature on the explanatory strength of factors of the revolution, creating a strong need to test the hypotheses of Model I.

Eckstein's second hypothesis claimed that the class base of revolution shapes future economic welfare. The logic of this hypothesis relies on the predictability of self-interest. The results showed that the class which participates most in the revolution does not necessarily

benefit the most. More specifically, peasants and workers benefit the least when they participate. Conversely in Peru, rural laborers benefitted when they did not actively support the revolution. I will also test a hypothesis similar to this one in Model I because the literature on this particular factor is highly controversial.

Eckstein also hypothesized that post-revolutionary social welfare is dependent on the mode of production instituted by the revolutionaries. Interestingly, she found that the mode of production most affected the dependent variable. Socialist regimes can, through their access to economic surplus, more easily redistribute wealth downward and redesign health care delivery systems. Thus, Eckstein would argue that the state plays an instrumental role in determining social conditions because it has control of the economic surplus of the country.

Next, Eckstein proposed that the historical epoch in which the revolution occurs and the time lapse involved in starting up the new government affect the social welfare options available following the revolution. Results showed that popular sector interests must, over time, be sacrificed to middle and upper class interests. Eckstein explained this effect by showing that as a regime consolidates power it may cater to popular interests, but that as time elapses, the new regime must succumb to economic development issues which require more service to the middle and upper classes. Model I in this study will look more specifically at the

time lapse between the beginnings of rebellion and the transfer of power, borrowing from Eckstein the logic that a regime will cater to its supporters.

The final hypothesis of Eckstein's study claimed that class structure and class relations cause different social welfare courses in revolutionary societies than in non-revolutionary societies; i.e., post-revolutionary regimes are more likely to be concerned with development and distribution issues than the societies which they displaced. To test this hypothesis, she paired each revolutionary country with a similar non-revolutionary country. The results of this test, measured by land reform, indicated that both revolutionary and non-revolutionary countries instituted agrarian reform, but the reform was much more extensive and broadly based in the countries which had revolutions. This effect is possibly due to the new regime's desire to promote distribution and development, which will eventually benefit the ruling class's interests. This study will use the pair methodology to determine the extent of social change which may actually be attributed to the revolution and not to intervening factors.

Michael Lewis-Beck's research on the question of revolutionary outcomes is particularly relevant to the present research (Lewis-Beck, 1979). Lewis-Beck studied the Cuban evidence to determine what economic effects a revolution brings both short and long term. He found that "with regard to economic growth, short run benefits and long

run costs appear to follow revolution." Although he found a fairly significant correlation between the occurrence of revolution and economic trends, his model is weak in explanatory power. He qualified himself in his conclusion, admitting that external forces may in fact be the causal independent variables. For this reason, Model I tests internal factors, while Model II weighs the influence of external factors on revolutionary outcomes.

In summary, the literature supports the theory behind Model I. Echols implied that the ideology of the revolution might cause later social conditions. Eckstein found that the class base of support for the revolution, the state and the time lapse since the revolution all influence post-revolutionary outcomes. Finally, both Kelley and Klein and Lewis-Beck identified important differences in the short term and the long term effects of revolution. Each of these findings has been incorporated into the theory of Model I so that the results of this study may improve the current body of theory.

Model II

Dependency literature provides the background for Model II, which focuses on economic factors of revolutionary outcomes. Two of the earliest dependency theorists in the field are Cardoso and Faletto, who offered their Theory of Dependency and Development. Cardoso and Faletto used the logic of capitalist accumulation to preface their argument.

The two most important characteristics of the process of capitalist accumulation are the concentration of capital in the hands of multinational corporations and the virtual monopoly of technological progress held by enterprises in the center of the international system (Cardoso and Faletto, 1979). This situation of capitalist development exploits the economic situations of less developed countries. Thus, Cardoso and Faletto concluded that the economic existence of the periphery is dependent upon the advanced capitalist economies of the world.

This argument is very important to development theory, and it provides the backdrop for a stinging debate on the process of development. Its relevance here is similar to Eckstein's world economic position hypothesis. Cardoso and Faletto would argue that with respect to revolutionary outcomes, a country's dependency on foreign development assistance would override any state-level factors (i.e., factors of the revolution) in determining post-revolutionary social outcomes. Dependency would be the independent variable in such a hypothesis.

Caporaso's dependency work generally agrees with Cardoso and Faletto. He argued that a structural-systemic and historical analysis is the proper one for dependency theory (Caporaso, 1980). This work also argued that the periphery is dependent on capitalist industrialized economies for its development path. Caporaso claimed that relationship is much more determinate than any state-level

factors. Thus, Model II is designed to resolve the debate over whether the state-level factors (which include some factors of the revolution) or the external factors (which include dependency) play a stronger role in post-revolutionary social conditions.

The other side of the dependency debate is typified by Evans. While he looked at the earlier wave of dependency argument and agreed with its general assumptions, he examined the case of Brazilian development and concluded that dependency theory needs some adjustment (Evans, 1977). The Brazilian evidence showed that, in historical terms, the state is the source of change in dependent relationships with industrialized economies, not the multi-national corporations (hereafter, MNCs), as was earlier thought to be the case. Evans showed how peripheral states are learning to maneuver to gain more control in such relationships, using restrictive and limiting measures against the MNCs. Evans' research is applicable to this research not only because he contradicted traditional dependency theorists, but because he would argue that state-level factors are causal. Thus for Model II, Evans, in theory, would argue that dependency would not necessarily influence post-revolutionary social outcomes.

Finally, one of the most recent development theorists, Tony Smith, flatly refuted the Cardoso- and Caporaso- type dependent development theories. After reviewing the

dependency literature, he practically denied the current existence of dependent relationships:

. . . the system of North-South relations is not only too weak to determine all aspects of change within the South . . . but that even in those areas where its influence is real, its long run effect may well be to hasten the end of the international predomination of the North. (Smith, 1986)

Smith claimed that the North-South system of relations is not nearly as influential as others have characterized it. However, in the few cases where it does have some effect on conditions in the South, that effect is to improve conditions. Consequently, Smith might say that the relationship might actually be beneficial to the South. Obviously, Smith would agree with Evans with respect to this research, and even go a step further, arguing that dependency has no effect on post-revolutionary social conditions.

The dependency literature presents a great deal disagreement over the effect of dependency. Cardoso and Faletto argued that capitalist accumulation of developed countries causes an economically dependent relationship which is highly restrictive for developing countries. Caporaso emphasized that the dependent relationship is more influential in developing countries than any state-level factors. Finally, Evans and Smith refuted dependency theory and claimed that dependent relationships either do not exist or have little influence. Because these theorists contradict each other so blatantly, Model II will test the

effect of dependency on social conditions in both
revolutionary and non-revolutionary countries.

METHODOLOGY

INDEPENDENT VARIABLES

Model I

Model I consists of three hypotheses based on the premise that characteristics of the revolution itself influence post-revolutionary social conditions.

Hypothesis 1: Length

The first hypothesis concerns length of the revolution. The longer a revolution takes to change the control of power, the more likely it is to lose popular support. One would assume that the revolutionary government, in this scenario, would have relatively low levels of legitimacy and civilian confidence. It is likely to be less effective and less stable, causing social conditions to worsen in the short term and long term. The strain on a country's infrastructure resulting from a prolonged internal war poses a formidable obstacle from which a new government must recover.

The effect of this variable is apparent in the case of the Iranian revolution in 1979. The period of turbulence before the transfer of power was relatively long. During this time, the Ayatollah Khomeini was consolidating power and the capacity of the state was declining. Consequently, the degree of violence was much higher and the violence was more prolonged than it might have been had the Ayatollah

Khomeini been able to consolidate his support and seize power more expediently.

I shall define length of the revolution as the time from which vocal public rebellion began until the time at which power officially changed hands. Vocal public rebellion will be measured by the first public dissent which is significantly greater than any earlier rebellion, i.e., when the government reacts more noticeably or press coverage is greater. Length is coded in years and is based on historical data.

Hypothesis 2: Ideology

The ideology of the revolutionaries may also determine later social conditions. If capitalism and development are goals of the revolutionaries, the new government will initially spend less on the agricultural and social sectors and more to finance its development efforts. This causes worsening conditions at the outset of the new regime, but long term social conditions will improve because the benefits of the development efforts and the ensuing industrialization of the country will "trickle down" to the masses. A social reform ideology, on the other hand, will have the opposite effects. Conditions early on will improve because the reformers want to demonstrate to their supporters that they are competent and committed to reformist goals. Because the new leaders are usually inexperienced and not the seasoned bureaucrats of the old regime, they lack the "human capital" to achieve their goals

long term. Consequently, social conditions eventually worsen.

The cases of Russia and China fit the ideology hypothesis very well. In Russia, for example, the new regime espoused an ideology of Leninism--urban growth and development, and production modernization and industrialization. The post-revolutionary government followed a strictly pro-industrialization path, and social conditions did not improve immediately but slowly progressed over time. The example of China fits this hypothesis. After the revolution of Mao Tse Tung, the regime heavily favored the agricultural sector of the economy and undertook many social reforms. This is exactly the ideology which the revolutionaries promulgated before they won power. China's social conditions might be summarized as rapidly improving immediately after the revolution, then slackening off, and finally entering a state of decline.

Ideology is measured by publicly stated goals, demands and campaigns of the revolutionaries. Demands of capitalism, development and modernization are coded as "development". Other welfare-oriented demands, such as equality and social reform, are coded as "reform."

Hypothesis 3: Support

The independent variable of the third hypothesis is the class base of support for the revolution. Revolutions with mass support produce leaders who must satisfy the demands of the mass public to achieve legitimacy for the new regime.

Because of this pressure, the new government will conscientiously strive to improve social conditions as soon as possible after the revolution; however, in the long term, these leaders fail to balance the different sectors of the economy, and social conditions worsen. Elite-supported revolutions tend to place experienced bureaucrats with long-range plans in powerful and influential positions. Generally conservative, they make no rash, immediate changes to social policy of the old regime, but they are able, long term, to improve social conditions.

The case of Hungary's unsuccessful revolution in 1956, for example, shows what effect the class base of revolution supporters can have on the long term social conditions following the revolution. The middle- and lower-classes were the instigators of revolution in this case, and when the revolutionaries seized power, they thoroughly purged and rebuilt the mostly elite-controlled state party. Hungary, then, was a liberal socialist state, and the new regime issued reforms in their own class-based interests, thereby improving social conditions in the short run. In the long term, however, the Hungarian state fell back under Soviet control, and the economy declined. It is now in the third world economic state which most Eastern bloc economies face.

Support is defined as the approximate class which most favored the revolution and which contributed the most to the revolution, whether through leadership, financial support, or other contributions. Thus, the class base of the leaders

of the struggle, the financiers of the struggle, and the new regime's high officials, determine support. Support is coded as mass or elite.

Model II

Model II has one hypothesis: that the revolutionary country's pre-revolution global economic relationships determine post-revolutionary social conditions. Before a revolution, if a country is dependent upon capitalist industrialized countries for its own economic development, the occurrence of revolution will not change those relationships. Dependency overshadows any progress that a revolution may succeed in making.

Nicaragua has been characterized as a case of dependent development, for it exports chiefly primary products and remains economically enslaved to highly fluctuating world markets. Just as Nicaragua was highly dependent and exploited by its world economic relationships before its revolution, so today, eleven years later, Nicaragua is still dependent upon patrons such as the Soviet Union. Some dependency theorists would claim this case as support for the theory that the influence of the dependency variable is so strong and so binding on a country's future that internal factors, including revolution and government restructuring, cannot mitigate the situation.

The case of Japan provides an interesting contrast to the strict analysis of "dependencia." Before the country's

revolution, all trade in the Japanese economy was controlled by foreigners. The elite-dominated revolution in Japan installed elites in bureaucratic positions after the revolution to restore its once independent economy and political structure. This move, which constitutes a state-level/factor of the revolution variable, was successful in alleviating Japanese economic dependence to the extent that today Japan is the second leading donor of foreign aid to developing countries. This example, supporting Evans' and Smith's argument, shows that dependency is not necessarily an insurmountable obstacle and that a revolution may be helpful in reversing dependent relationships.

Dependency is measured by balance of trade with the United States. Countries with a trade deficit are coded as dependent, and countries with a trade surplus are coded as independent.

Revolution and Social Conditions

The dependent variable for both models is post-revolutionary social conditions. Social conditions are measured over time. The measure for social conditions is Wilkie's HEC Ranking, the only standard measure available for all of the cases considered at the necessary points in time. Since the first year for which the HEC Ranking is available is 1940, these data will be supplemented with contextual and quantitative data whenever possible.

The HEC Ranking is an index of social conditions devised to compare Latin American progress with that of the United States. The HEC Ranking is one of the most comprehensive indices of social conditions, covering the areas of health, education and communication. Statistics from these areas tend to provide a reliable measure of the effects of social programs instituted by governments. These effects are, in turn, a good measure of the quality and effectiveness of social programs. The HEC Ranking consists of these indicators:

Health:

- life expectancy
- infant mortality rate
- persons per hospital bed
- persons per physician
- persons per dentist

Education:

- literacy rate for population age 15 and over
- share of school-age population enrolled in secondary school
- share of students in higher schools as a share of students enrolled in primary schools

Communication:

- newspaper circulation, copies per 1000 persons
- number of telephones per 100 persons

number of persons per motor vehicle in use
While the data used to calculate the ranking for years 1950-1970 are reliable, no data are available for 1940. Wilkie used statistical methods to project the ranking back to 1940 (Wilkie, 1977).

Methods

This study utilizes both the historical and quantitative methods of political research. Data collection involved consulting respected historical documentation and literature and collections of quantitative data, both of which are cited as they appear. Historical documentation included case studies of the revolutions and documents published by participants in the revolutions. Quantitative data was drawn from statistical studies of social conditions in the selected countries, government documents, and statistical analyses of federal expenditures in the selected countries.

I have selected the two most plausible models explaining the outcomes of revolution and tested them against each other to determine which one best answers the research question. By comparing the results of Model I and Model II, the study can eliminate the hypotheses which are not supported by the evidence. The goal is to synthesize the strongest explanatory variables and to create a new model which encompasses these findings.

Cases

The cases studied are Mexico and Cuba. This selection may limit conclusions to revolutions occurring only in Latin America. However, by attempting to choose most similar countries, it affords the luxury of holding both cultural and geographical factors constant. This method should allow the results to be generalized to all revolutions in Latin America, and it should add to the contextual knowledge of the region.

The Mexican Revolution was a popular, peasant uprising resulting in a republican form of government, whereas the Cuban Revolution involved more of the middle and upper classes and resulted in a Communist regime. Thus the cases are different in type of revolution. This difference should increase the generalizability of conclusions to various types of revolution, rather than allowing application only to peasant revolution or only to Communist revolution.

The comparison of models involves further cases. The most similar countries method was used. In Model II, I have matched the original cases of revolution with countries which did not have a revolution. The pairs are Mexico and Venezuela, and Cuba and the Dominican Republic. The countries were selected on the basis of similarities at the time of the revolutions in Mexico and Cuba. The factors held constant are primary product and regional location.

For Mexico and Venezuela, oil production was an important consideration. The fact that Mexico depends

largely on oil revenues to fuel its economy had to be reflected in its non-revolutionary pair to prevent any misleading conclusions from the balance trade data. This pair is also less susceptible to any false conclusions about variable relationships with social conditions because oil production is held constant. If oil has an unusual effect on social conditions in countries which produce it, that effect will not skew the results of this research. Likewise, sugar production was held constant across Cuba and the Dominican Republic.

The following tables present data collected to support these considerations.

MEXICO and VENEZUELA

Factor	Mexico	Venezuela
Primary Product	oil	oil
Regional Location	Central America	South America

CUBA and THE DOMINICAN REPUBLIC

Factor	Cuba	The Dominican Republic
Primary Product	sugar	sugar
Regional Location	Central America	Central America

The creation of pairs serves another important purpose. It allows a greater degree of isolation of the variables. By comparing the dependent variable across both revolutionary and non-revolutionary countries, it is easier to see the pure effect of the independent variable on the dependent variable. In other words, we are better able to determine if the factors hypothesized indeed caused the revolutionary outcomes. Susan Eckstein used the pairing method in her study, summarized in the literature review section of this paper, quite successfully (Eckstein, 1982). Thus, her conclusion that revolutionary regimes are more concerned with distribution and development was much

stronger than it would have been had she not tested the agrarian reform across countries.

The pairs also serve a third important function. By structuring comparison across pairs of revolutionary and non-revolutionary countries, this research will test the significance of revolution-caused social change. Such a conclusion is an important one to make because it should determine in broad terms whether revolutions are beneficial to the countries which have them.

PREVIEW

The following chapters contain the formal documentation of this research effort. Chapter 2 presents evidence and conclusions for factors of the revolution as the causal variable in revolutionary outcomes, with Model I looking at both the Mexican and Cuban cases. Chapter 3 similarly presents evidence and conclusions for Model 2, testing the dependency theory applied to revolution. The pairs of Mexico and Venezuela and Cuba and the Dominican Republic are discussed in this chapter. Finally, Chapter 4 presents my conclusions. This chapter will compare the two models, outline what support I have found for the theories and what limitations I have discovered, and ultimately refine the theory so that it may contribute to the body of knowledge of social science.

CHAPTER 2

INTRODUCTION

This chapter will test Model I. It will discuss the evidence for Mexico and Cuba, examine the results, and make some preliminary conclusions about the explanatory strength of the model.

MEXICO

Background

The history of the Mexican Revolution is a complex one, even as revolutions go. While a comprehensive history of the revolution is inappropriate here, some background is necessary to understanding the variables which Model I considers: length, ideology and support.

The Liberal Party held power in Mexico during the period of 1855 through 1876. The legislative focus of this period was reform, with the Liberal Party attempting to create a new class of smaller land holders who would then push forward the development process. The result, however, was an even denser concentration of the rural agrarian population in latifundia.

This undesired process continued through the dictatorship of Porfirio Diaz, who ruled Mexico authoritatively from 1876 until 1910 when he was overthrown by revolutionaries. Diaz's scheme for development was to create "demarcation companies" (Gilly, 1983). The Diaz regime passed settlement acts to set up these demarcation companies, enabling them to enclose vast amounts of common land and enlarge the already huge latifundia. Gilly notes

that "belonging to a small, government-linked oligarchy, they [demarcation companies] had enclosed some 49 million hectares by 1906--a quarter of Mexico's territory." The government had a specific reason for these seizures: once it seized the land which peasants had been farming, a large supply of day-laborers would be freed. The regime knew that the dispossessed peasants would be willing to provide cheap labor out of necessity, and the government needed labor to power the spread of capitalism.

With this background in mind, the first variable discussed will be length of the revolution.

Length

Although the Diaz regime began to lose popularity as soon as its land seizure policy became evident to the peasantry, formal opposition took some time to take shape.

The official start of the revolution should be noted as the publication of the reorganized Mexican Labor Party's (MLP) new program. Operating from exile since 1904, the MLP published its program from St. Louis, Missouri in 1906 (Gilly, 1983). The program called for the overthrow of the Diaz dictatorship and was widely publicized in the Mexican press, making the Diaz regime nervous enough to make elimination of the MLP a unofficial policy. The degree of attention paid to the opposing MLP and its revolutionary program marks this event as the beginning of revolutionary dissent.

The MLP's dissent was fortified within Mexico by labor strikes against repressive government labor policies. Miners and textile workers struck against government policies without the support of union organization. The workers made extensive demands for labor reform. Significantly, the 1906 strike of copper miners in Cananea was violent and insurrectionary, culminating in a mass march of strikers and strike supporters through the town of Cananea. Government troops had to be sent in to restore order, which was unusual in Mexico at this time.

Therefore, the Mexican revolution began in 1906. The MLP published their new program in 1906, and the most insurrectionary labor strikes also began in 1906.

Although Diaz was overthrown in 1910, most scholars do not consider this the formal end of the revolution because of the continued violence and the frequent transfers of power in the decade following Diaz's downfall (Levy, 1983). After Diaz fell, Francisco Madero became Mexico's president, but he lasted only three years until he was murdered in a coup attempt in 1913. Dictator Victoriano Huerta was installed next, but he failed to consolidate his power.

Three armies then battled for control: Zapata led peasant forces from the south demanding land, Pancho Villa led forces with a violent desire to continue the revolution and Venustiano Carranza led a third army with the most conservative constitutionalist ideology (Knight, 1986). Carranza and the constitutionalists defeated the others, but

held onto power for only five years, from 1915 until 1920. Meeting the same fate as his predecessors, Carranza was violently overthrown and murdered in a coup.

The regime which took over in 1920 signifies the end of the revolution because it was able to hold power, peacefully, for a longer period of time than any of the preceding regimes. The Northwest Group, one of the many revolutionary groups competing for power, installed Alvaro Obregon as president, and the group managed to stay in power until 1934.

Thus, Mexican Revolution lasted 14 years. It officially began in 1906 with the publication of the MLP's revolutionary program and ended in 1920 with the beginning of the Northwest Group's rule.

Ideology

Various groups of revolutionaries espoused different ideologies throughout the revolutionary period, yet all of them can be classified loosely as reformist. The two most significant ideologies were grounded in labor reform and social reform.

Since labor strikes were one of the most common manifestations of dissent, worker demands constitute a formal ideology. The striking copper miners in Cananea had an explicit list of demands: five pesos for an eight hour day, greater respect for the work force, and a distribution in every job of 75 percent Mexican workers and 25 percent

non-Mexican workers where abilities were equal (Gilly, 1983). Gilly describes the labor ideology as a "manifesto which attacked the dictatorship as an ally of foreign employers." A large scale strike by textile workers in Rio Blanco, which was formally organized despite prohibitions by employers' associations, resulted in an employer lock-out and a strike of 5,000 workers. Demands by this group were similar to the Cananea laborers and other strikers around Mexico. Demands made by the all of the various strikers called for reform of repressive and unfair labor legislation.

The social reform ideology came predominantly from the MLP program of 1906. This nationalist and democratic program became the battle cry of most of the revolutionary period, with these ideas espoused by other groups competing with the MLP for power. The ideology demanded the following social reforms: compulsory lay education up to the age of fourteen, with better pay for school teachers; nationalization of clerical property placed in the name of various figureheads; a maximum eight-hour day and obligatory free Sundays; a minimum wage of one peso, or more in areas with a higher cost of living; and, regulation of home-based labor and domestic service. Also included in the demands were: a ban on child labor before the age of 14; employer-funded improvement of hygiene and safety standards at work; compensation for work place accidents; cancellation of all peon debts to the landowners, and abolition of employers'

shops; establishment of an agricultural bank; restitution of village land and redistribution of unexploited farmland among the peasantry; and finally, protection for the Indian peoples (Gilly, 1983).

The different regimes that ruled during the revolutionary period, 1906-1920, promulgated the reformist ideologies of the revolutionaries in one way or another. During Carranza's rule, the Constitutional Convention of 1917, drafted a constitution including several of the reforms which the MLP had called for 11 years earlier. The new constitution pledged land reform and labor reforms including a minimum wage, eight-hour day, and some requirements for employer-provided health, housing and educational opportunities (Levy, 1983). Obregon, who succeeded Carranza, went beyond the limited reforms of Carranza and further liberalized labor and educational policies.

Obviously, with so many groups competing for post-revolutionary control and so many leadership takeovers during the revolutionary period, a uniform ideology would have been impossible. But, while the revolutionaries didn't consolidate their viewpoints or their forces, the central ideas in each of their ideologies were distinctively reformist.

Support

Peasants and other members of the agrarian class fought the Mexican Revolution. The early stages of the struggle were a series of peasant uprisings. The first significant uprisings occurred before 1910 in the northern state of Chihuahua; the governor of Chihuahua, Abraham Gonzalez, was a supporter of Madero, the exiled leader of the MLP. Francisco Villa, Pascual Orozo, and others led small peasant units fighting against national army detachments which had been sent to crush the rebellion (Gilly, 1983). Smaller scale uprisings were occurring simultaneously in Durango and Coahuila State. These were the first guerilla actions of the revolution.

In late 1910, victories by the revolutionaries encouraged peasant gunmen and horsemen from the large cattle ranches to give up their jobs and join the rebels. By February of 1911, the insurgency had become widespread. Madero reentered the country later in 1911 and assembled 3,000 peasant soldiers in Ciudad Juarez the same year. The town fell as the first city in the hands of the revolutionaries.

With these successes, the peasants began to take bolder measures. Armed Indian peons began to seize large areas of land from the big haciendas. Thus, the village communities were able to reoccupy the land which Diaz's demarcation companies had expropriated in the previous decade.

The most concentrated expression of the peasant upsurge was the Zapatism movement. In addition to being a rancher, Zapata was President of the Anenecuilco communal council. He relied on the centuries-old land deeds as an organizing and motivating principle for the peasantry (Knight, 1986). Zapata and his supporters tore down the enclosure fences and distributed the land under protection of armed men, leaving peasants in possession of their plots once again. The peasant-supporters of Zapata also launched an insurrection to seize the town of Cuautla, and they captured it with 4,000 men.

In November of 1911, the Ayala Plan marked the beginning of severe disunity among the leaders of the revolution. The Plan charged Madero with deserting the revolution and was signed by 7 Zapatist generals, 17 colonels, 34 captains, and 1 lieutenant (Gilly, 1983). While this point marked the beginning of a power struggle among the revolutionary leaders, which continued throughout the revolution, it is important to keep in mind that the supporters of each faction were predominantly peasants and that the peasantry continued to support the revolution, regardless of the infighting among the leadership of each of the factions. Thus, support for the revolution was clearly mass support.

CUBA

Background

The period before the Cuban Revolution, like the period before the Mexican Revolution, was one of dictatorial rule. Sergeant Fulgencio Batista originally came to power in Cuba after the revolution of 1933. He continued to control the Cuban government through a series of puppet regimes until 1940. Scholars generally recognize the period from 1940 to 1952 as a constitutional period. Batista later led a coup to regain control. He ruled as dictator again until 1956, while the leading political parties compromised their positions and succumbed to Batista's heavy-handed rule. No organized or able opposition to Batista emerged during this period despite general dissatisfaction with his autocratic and repressive rule.

Length

The earliest signals of the Cuban Revolution appeared in 1956.

The year 1956 witnessed the beginning of a qualitative change in the attitude of the masses of Cubans toward the Batista regime. In spite of (or perhaps because of) a relative and temporary improvement in the economic situation of the country, popular hostility toward the regime began to increase by leaps and bounds; disillusionment was now replaced by a great increase of anger, although fear increased as well. (Farber, 1976)

The evidence for the "qualitative change in attitude" is threefold: the break of the compromise period, the student uprisings, and Castro's return to Cuba.

Almost since Batista came to power in 1952, he had been forced to negotiate with his opposition. The opposition parties were the Communist Party and the Ortodoxo Party. Both opposed his rule but declined to mount a serious opposition effort for fear of being cut out of political life entirely by Batista. Rather, they opted to choose a more moderate, even conservative, path by keeping the lines of communication with Batista's regime open. When such negotiations broke down completely in 1956, they began to form a moderate coalition against Batista.

Students had been demonstrating somewhat peacefully against the regime since 1952 but their activities had failed to motivate much support or attention. By 1956, however, student clashes with government police had become so violent and the brutality of the Batista regime so fierce that the University Council closed the University of Havana.

Castro's return to Cuba was the final spark needed to ignite the revolution. Having left Cuba when he was freed from prison, Castro traveled in the United States and Mexico, trying to drum up publicity and support for his revolutionary plans. By the time he returned to Cuba, he had organized his 26th of July Movement, which he named after his failed attempt to seize power a few years earlier. The Movement rapidly gained broad support upon Castro's

return and represented the first organized and capable opposition Batista had encountered.

On December 31, 1958, Batista fled the country. Castro took power immediately without formal opposition. Unlike the debilitating series of power struggles which occurred in Mexico after Diaz fled, the situation in Cuba was such that Castro had carefully consolidated all of his power bases by 1957, before he officially seized power. Compared to the 14 year long Mexican Revolution, the Cuban Revolution lasted a brief two years until power officially changed hands.

Ideology

Until Castro was able to form a cohesive opposition coalition, the goal of factional opposition groups was simply to overthrow Batista. The student activists had protested the human rights abuses of the regime, yet the ideology of that movement is best described as a general sort of populism. The other pre-Castro groups had been too afraid of extinction to promote any ideology too far left of the Batista regime, resulting in a meek, and unsuccessful, attempt at eliciting some liberalizing reforms from the regime. Thus, before Castro gained significant influence, no strong, comprehensive ideology guided the opposition.

The Manifesto of the Sierra Maestra filled this ideological void. Castro, Felipe Pazos (a respected Cuban economist and opposition leader), and Raul Chibas (the brother of Eduardo Chibas, former leader of Ortodoxo) issued

the Manifesto on July 12, 1957. This significant act represented not only the successful formation of an opposition coalition but also a formal ideological statement. The Manifesto was democratic and populist in nature, demanding

. . . the restoration of full civil liberties, union democracy, civil service reform, a campaign against illiteracy, and the establishment of the bases for an agrarian reform program which shall distribute idle lands and to convert into owners all those who possess small parcels of land, whether they are property of the state or of individuals, to be done with previous indemnification to the former proprietors. (Farber, 1976)

Clearly, the Manifesto of the Sierra Maestra was the best known position paper of the revolutionary movement. What is interesting about Cuban revolutionary ideology is that very few labor reform demands were made on the old regime, yet the post-revolutionary regime instituted communism, a labor-oriented political and economic system.

Support

As the short length of the revolution--two years--suggests, the revolution enjoyed a broad enough base of support within Cuba that it was able to overthrow the dictatorship without a long, drawn-out struggle as we saw in the Mexican case. Contempt for the regime was strong when Castro returned to Cuba, but his charismatic leadership and political savvy were responsible for the almost immediate acceptance of the 26th of July Movement.

Despite the eventual strength of the Movement, the student activists could be considered the original revolutionaries. They were the first group to formally organize, though not effectively, in 1952 with the Federation of University Students (FEU). In 1955, students founded the Revolutionary Directorate (Directorio Revolucionario), an underground association formed to organize armed resistance to the regime. The students realized when Castro returned that his 26th of July Movement would be more successful than the Directorio Revolucionario could be, and they threw their support to Castro. The student support for the 26th of July Movement, like the wide civilian support which Castro collected, was largely middle class with some elites and some working class members.

The abundance of middle class support is even more evident when the Civic Resistance Movement is considered. Civilians, mostly middle class businessmen, academia, manufacturers, white-collar workers, and housewives (Farber, 1976), formed this group in early 1957 to aid the 26th of July Movement in logistical matters such as creating propaganda, fund-raising, collecting supplies, and smuggling weapons.

The last untapped reservoir of support for the revolution was the lower working classes. In 1959, immediately following Batista's departure, Castro called a massive, general strike. This served no purpose other than to elicit allegiance from the laboring classes, which had

not previously endorsed Castro formally. At that point, the revolution had already succeeded and did not need this endorsement, yet the fact that the workers did agree to strike shows the true extent of support for the revolution--all sectors of Cuban society had been in favor of the revolution, and most had contributed to its success.

However, the difference between favoring a revolution and supporting a revolution (as defined in the Methodology section of Chapter 1) is crucial to examining the support variable accurately. Those who contributed the most to the revolutionary effort, the most money, the most time, the most bodily sacrifice, are the supporters of the revolution. In this case, the supporters were the middle class. Middle class is the class base of the student movement and the Civic Resistance Movement; the 26th of July Movement, while popular with all sectors of Cuban society, was supported heavily by the middle class. Therefore, support for the Cuban Revolution is middle class, which, in the parameters of this research, will be coded elite.

POST-REVOLUTIONARY SOCIAL CONDITIONS**Mexico**

As the graph of available HEC Rankings for Mexico below shows, social conditions in Mexico improved from 1940 to 1950, then conditions declined through 1970. Although long term decline in social conditions is quite clear, this information alone is not enough to determine the fate of social conditions in the short term.

1967), are examined. The percentage of the federal budget devoted to education jumped from 1.3 percent in 1920 to four percent in 1921 under the new regime. This budgetary outlay continued to rise steadily, reaching a high of 13.6 percent in 1937. But long term education spending lowered back down to 8.2 percent by 1955.

Public health, welfare and assistance funds also increased as a share of the federal budget. Slumping at .4 percent of the total budget in 1900 and only rising to .9 percent in 1919, after the revolution the percentage of the budget paid in assistance rose steadily to reach a peak of 6.5 percent in 1941. In the long term, however, the assistance paid lowered to 2.5 percent in 1941.

The above statistics represent a social conditions index, federal education expenditures, and federal public health and welfare expenditures. They all point to the same conclusion about the trend of post-revolutionary social conditions in Mexico. Conditions improved in the short term, peaking between 1940 and 1950, but social conditions steadily worsened in the long term, with indicators falling for the period considered in this research.

Cuba

Post-revolutionary social conditions in Cuba took quite a different course than they did in Mexico. Progress has been steadily improving since 1960, without any slips backward. As the graph of HEC Rankings for Cuba depicts,

the period before the revolution was one of sharp decline. Some progress had been made during the so-called constitutional period, when the dictator Batista was absent from the Cuban political scene. When he regained power, social decline followed. The improvement in social conditions since the revolution marks this change dramatically.

CUBA: HEC Ranking
1940-1970

HEC Rank	1940	1950	1960	1970
16			*	
15			*	
14			*	
13			*	
12			*	
11			*	
10			*	
9			*	
8			*	
7			*	X
6			*	
5		X	*	
4			*	
3	X		*	X
2			*	
1			*	
0			*	

[* Revolution]

What do other indicators of social conditions tell us about Cuba? In agreement with the HEC Rankings, indicators measuring such social needs issues as education level and the distributions of health care and income all show that

social conditions since the revolution have improved steadily. The following discussion of indicators is based on statistics from Claes Brundenius' 1984 study of economic growth in Cuba since the revolution.

The level of education Cubans receive has increased progressively since 1959. In 1960, only 2.72 percent of the population were receiving a secondary higher level education. By 1970, that percentage had reached 2.78, and in 1980 a full 12 percent of the population were being educated at that level (Brundenius, 1984). Such an increase is comparatively much faster than the norm for that time period in Central America (Halebsky, 1984).

Access to health care has been improved at a similar rate by Castro's regime. In 1960, there were 32,508 hospital beds per 1000 inhabitants of Cuba. In 1970, that number had climbed to 40,101, and by 1980 there were 44,339 hospital beds per 1000 inhabitants. The number of physicians serving each 1,000 inhabitants also greatly increased under Castro's regime, rising sharply from 6,152 in 1970 to 15,247 in 1980 (Brundenius, 1984). These figures show the improvements in health care which have been made by the revolutionary regime.

Finally, income distribution has also been improved since the revolution. The per capita income of the poorest 40 percent as a share of total income rose from 6.5 percent in 1958 to 17.2 percent in 1962. That figure was 20.3 percent in 1973, and it had increased 4.5 percentage points

by 1978 to 24.8 percent (Brundenius, 1984). Although we would expect income redistribution to occur after a communist revolution, these improvements in income distribution are still a good indication of improvement in social conditions. When compared with redistribution efforts in the Soviet Union, Cuba has done much better in equalizing distribution than its Soviet counterpart (Perez, 1988).

RESULTS

Are the factors of the revolution, the independent variables, responsible for these trends in social conditions in Mexico? Holistically, the model seems to work fairly well, but an analysis of each variable relationship is necessary to judge the true explanatory power of the theory.

Hypothesis 1 states that when a revolution takes a longer period of time to overthrow the regime and officially transfer power, social conditions after the revolution will decline, both in the short term and in the long term. For the Mexican case, the hypothesis holds only for the long term trend. In the short term, conditions in Mexico improved. But in the long term, conditions did eventually decline and still continue to descend from a peak between 1940 and 1950.

For Mexico, the length hypothesis is not very strong. After the revolution, the new regime was able to improve conditions for two solid decades. The damage that the revolution caused internally, although it was extensive in Mexico, was simply not an insurmountable obstacle for the new regime. However, the prediction that conditions would decline was accurate. This leads to the conclusion that length of the revolution has only a limited effect on social conditions.

Hypothesis 2 argues that the ideology of the revolution determines trends in social conditions after the revolution.

This hypothesis works very well in Mexico. The reform ideology correlates with the short term increase and long term decline as predicted. Evidence concurs that the new regime began immediately to improve conditions by increasing government spending on social needs as revolutionary leaders had promised to do when they took office. This activity successfully achieved the reformers goals of improving living conditions in Mexico.

The hypothesis is just as strong applied to long term conditions as it is applied to short term trends. Persistent long term declines have occurred in Mexico despite government intentions to keep the improvement going. The Mexican government has been plagued by well-documented bureaucratic inefficiency (Hansen, 1971), not to mention corruption. The reformers who took power in 1924 had little previous experience in government, and the problems Mexico has faced in the last half century, including a burgeoning population, unsatisfactory health care delivery and the specter of slow economic development, would pose a daunting challenge to the most experienced bureaucrats. The lack of human capital in the post-revolutionary government has only been superficially remedied over time. This neglected problem eventually emerged in the 1940s (Reyna, 1977). The result was a slow but steady decline in social conditions which continues today.

The last hypothesis of Model I also works well in the Mexican case. The mass support the revolution received

required some sort of "compensation" from the new leaders. The government responded with increases in federal spending on education and welfare needs, with the result of improving general social conditions as the HEC levels show. But the improvement could not last long. The new regime attempted to win popular support by fulfilling the needs of its supporters, and it succeeded in this task. Yet it seriously neglected the other sectors of the national economy. By focusing on social needs and failing to invest in other interests, such as industry and business, the regime set itself up for the eventual decline. Soon it was faced with economic problems that could not be ignored any longer, and government spending of social needs sharply declined. Thus, the ideology of the revolution played a highly influential role in determining post-revolutionary conditions by determining the motivations and actions of government policy.

Does the model work as well on Cuba as it did on Mexico? Yes and no. While hypothesis 1 works for Cuba where it only worked partially for Mexico, hypothesis 2 works partially on Cuba where it worked well for Mexico. Hypothesis 3 similarly works only partially on Cuba.

Since Cuba's revolution was comparatively short, only lasting two years with a small amount of violence suffered, we would expect that conditions should improve short term. This indeed is the case in Cuba, as the evidence has shown above. Taking power in 1959 when social conditions had been

declining since 1950, the Castro regime immediately began instituting social reforms which reversed that trend.

We could assume, then, that with relatively little fighting and virtually no damage incurred by the country's infrastructure, the regime did not need to waste any time "cleaning up" and was able to undertake the reform legislation it had promised right away. But this assumption would be fallacious because of the Mexican data, which showed that a long revolution does not preclude a short term improvement in social conditions. In addition, the long revolution produced decline in long term post-revolutionary conditions, and the short revolution produced long term improvement.

These discrepancies show that length does not have the effect we thought it would. It seems that the length after the revolution is more indicative of social conditions than the length of the revolution itself. The hypothesis could be revised to reflect that observation. It might be that social conditions improve in the short term after any revolution, regardless of type. However, if this is true, there is some intervening variable causing the long term differences in the cases.

Ideology clearly works short term in the Cuban case. Castro had promised to alleviate dissatisfaction with Batista's disregard of the masses' needs, and he did exactly that.

Growing prosperity and the redistribution of wealth, plus other social and political events that took place in the aftermath of Batista's overthrow, had made the overwhelming majority of Cuba's workers and peasants very satisfied with the new regime. (Farber, 1976)

Castro's reforms were in keeping with his reformist ideology and were very predictable.

In the long term, however, we would expect that social conditions would decline because of a lack of human capital. This did not happen in Cuba. Social conditions continued to improve, thus refuting explanation offered by the hypothesis. Long term improvement might have occurred in Cuba for several reasons, none of which the hypothesis accounts for. One possible reason is that there was an adequate supply of human capital in the government, enabling the regime to continue placing attention on social needs while balancing that focus with other economic demands. Castro had an army career before entering politics, giving him some bureaucratic expertise. He surrounded himself with officials loyal to him and the Communist Party, yet he also required some practical know-how in his aides and officials. Castro also took care to balance economic needs by depending on sugar production to fuel the economic development (MacEwan, 1981). This strategy seems to have worked well, and long term improvement in social conditions did not need to be sacrificed.

The support variable also seems to have a curious effect. As we noted earlier, support for the revolution in Cuba was elite-based. Thus, the expected trends in social

conditions are short term decline and long term improvement. The explanation for both short and long term improvement in Cuba is grounded in the major idiosyncrasy of the revolution--communism. Though Castro's left wing tendencies were apparent before the revolution, he was never expected to institute a system as radical as the one which has evolved in Cuba (Farber, 1976).

The hypothesis rationalizes that a revolution with elite support would have short term decline because the new elites in power would sacrifice mass interests to economic development, thereby serving their own class interests. Castro was not bound by this rule because virtually everyone in the country favored his regime. While his early reforms suited the lower classes, they did not do much damage to the position enjoyed by the upper classes. His emphasis on sugar production also kept the elites of Cuba very satisfied. Castro did not attempt any radical reforms in the beginning of his regime to preserve and further entrench his already massive popularity (Seers, 1984). That way, when he did begin the radical reforms which no one ever expected, his regime was so entrenched in power and so overwhelmingly accepted by the public that he did not arouse serious opposition to his program. He had also spent much energy strengthening the membership Communist Party and crushing other parties (Farber, 1976). In doing so, he managed to co-opt every sector of society, giving all levels

of society a stake in the country so that his reforms did
seem like a "people's revolution."

CONCLUSION

Based on the analysis of Mexico and Cuba, Model I has some limited explanatory strength but also needs some significant revision to be reliable and generalizable. This section offers a preliminary evaluation of Model I, to be revised in accordance with the results from Model II analysis.

Length seems to have little effect on social conditions. The explanation for the short term improvement in Mexico cannot be attributed to length and neither can the significant discrepancies between the cases. So this hypothesis should be discarded.

Ideology works fairly well in both cases. The explanation for Cuba's long term improvement is case-specific, giving us reason to believe that the ideology hypothesis would work in most other cases as it did in Mexico. The fact that it doesn't work in the long term in Cuba is actually to Castro's credit, for the hypothesis suggests that a reformist ideology has inherent limitations which cannot be overcome. Castro did overcome those human capital limitations and produced long term social needs improvement.

The one significant problem with the ideology hypothesis is generalizability. Because both cases were coded with reformist ideology, we don't know what the results would be in a case of developmental ideology.

The support variable, like the ideology variable, works well in Mexico but doesn't fit the Cuban case precisely. Again, the explanation is case specific. The revolution in Cuba, as noted in the earlier case discussion, had only elite support. The twist, though, is that the revolution was massively popular, with upper, middle and lower classes favoring it. Castro's charismatic personality also earned him an unprecedented following. Under these conditions, he was able to take the steps necessary to ensure short term improvement. These steps would not normally be taken by an elite-supported revolutionary regime. Thus, the support hypothesis might also work in most other cases, but it is still weaker than ideology as an explanatory variable.

With these adjustments, the model works well. In each of these cases, the post-revolutionary conditions can be attributed to factors of the revolution; so we can say with a moderate degree of assurance that the factors of revolutions, rather than external variables, explain the outcomes of revolutions.

This chapter considered the effect of factors of the revolution itself has on social conditions. Chapter 3 will test Model II, determining the effect dependency has on post-revolutionary social conditions by examining both revolutionary and non-revolutionary countries. Analysis of Model II will indicate whether external factors cause social conditions or play an intervening role.

CHAPTER 3

INTRODUCTION

This chapter discusses Model II. It will determine the effect of dependency on social conditions in both revolutionary and non-revolutionary countries. The revolutionary countries are Mexico and Cuba. They are respectively paired with non-revolutionary countries, Venezuela and the Dominican Republic, to show differences in social conditions, if any, between revolutionary and non-revolutionary countries.

The theory behind Model II argues that dependency, and not revolution, determines social conditions in revolutionary countries. As explained in Chapter 1, the logic is that dependency is a powerful force which revolutionary leaders cannot overcome. Thus, if a country is dependent when it has a revolution and its dependency increases, we would expect a decline in social conditions; the revolutionary process will not be able to prevent this decline. Conversely, if a country is not dependent at the time of revolution and does not become so, we would expect an improvement in its social conditions as a direct result of the revolution.

For these purposes, dependency is the state of reliance on a more developed, more industrialized foreign country for economic survival. Dependency is measured by trade balances with the United States. Trade deficits indicate dependency, and trade surpluses indicate independence.

This measure has some definite limitations which must be acknowledged. Trade balances with just one country may not reflect a country's overall trade balance. In particular, this measure is limited in its validity for the Cuban case because of the United States' trade embargo with Cuba. However, some methodological sacrifices must be made when studying time periods as early as 1920 because of the limited availability of data.

DEPENDENCY

The Revolutionary Countries

Mexico

At the close of its revolution in 1920, Mexico was dependent with a negative \$29 million balance of trade with the United States. It became slightly less dependent in 1930, with a positive \$13 million balance of trade. Yet in 1940, its trade balance went negative again at -\$21 million. Mexico's balance of trade then fell steadily through 1970, when it hit a deficit of \$452 million. The graph at the end of this section shows the dependency trend of Mexico more clearly.

From these results, we can see that Mexico was most likely dependent at the time of its revolution in 1906. At the end of the revolution in 1920, Mexico was still dependent. Dependency persisted through 1970, as the graph indicates.

Cuba

Dependency has not been a significant economic problem for Cuba since its revolution in 1956. The earliest available data on trade balances with the United States are for 1950. These data show Cuba as dependent in 1950, eight years before the end of the revolution, with a \$51 million trade deficit. In 1960, however, Cuba's balance of trade

with the United States was a positive \$120 million. This surplus, first recorded two years after the revolution, probably indicates a trend which developed throughout the decade of the 1950s.

Another assumption must be made about the Cuban data. With the United States' trade embargo, there has been a \$0 balance of trade with the United States since 1960. However, with the dramatic rise in trade balances from 1950 through 1960 and the continued strength of sugar production in the country, we can assume that Cuba's trade balances with other countries have taken the same upward course. Cuba, then, is coded as independent both at the time of the revolution and in the long term. The graph at the end of this section demonstrates Cuba's trade balances with the United States for 1950-1960.

While trade balances with the United States may indicate independence for Cuba, these statistics do not provide a complete picture of reality. Cuba's alliance with the Soviet Union since shortly after its revolution indicate that dependency, rather than independence is more likely to be the case. The large amounts of financial aid and military goods which the Soviet Union has supplied to Cuba overshadow the trade balances with the United States. Cuba would more accurately be coded as dependent in light of this evidence.

MEXICO: Balances of Trade with United States
 Millions of Dollars
 1920-1970

**Balance
of Trade**

500						
450						
400						
350						
300						
250						
200						
150						
100						
50						
0		13				
-50	-29		-21			
-100						
-150						
-200				-201		
-250						
-300						
-350					-357	
-400						
-450						-452
-500						
Year	1920	1930	1940	1950	1960	1970

(* Revolution: 1906 - 1920)

[Source for all balance of trade data: Wilkie, James, Statistics and National Policy, Statistical Abstract of Latin America Supplement 3 (Los Angeles: UCLA Latin American Center Publications, 1974).]

CUBA: Balances of Trade with United States
 Millions of Dollars
 1950-1960*

Balance of Trade		
500		*
450		*
400		*
350		*
300		*
250		*
200		*
150		*
100		120
50		*
0		*
-50	-51	*
-100		*
-150		*
-200		*
-250		*
-300		*
-350		*
-400		*
-450		*
-500		*
Year	1950	1960
	(* Revolution: 1956 - 1958)	

* The Cuban government has not released balance of trade data since 1960.

The Non-revolutionary Countries

Venezuela

Although the data for Venezuela appear to show dependency, they actually show early dependence with a later gain of independence. Venezuela's balance of trade dropped gradually from -\$2 million in 1920 to -\$27 million in 1930 and finally bottomed out at -\$79 million in 1940. This trend shows increasing dependence, but in 1950, Venezuela had a trade surplus of \$394 million. In 1960, the surplus was still relatively very high at \$328 million. The graph at the end of this section illustrates these figures.

The sudden reverse in Venezuela's trade balance shows that Venezuela became independent of the presumed constricting economic forces of dependency. Early in the period studied, Venezuela's trade balances were declining slightly, and so Venezuela can be coded as initially dependent. However the large surplus beginning in 1950 should be considered carefully. For the later years, 1950 through 1960, Venezuela can be coded as independent. Thus, the overall trend is one of increasing independence.

Dominican Republic

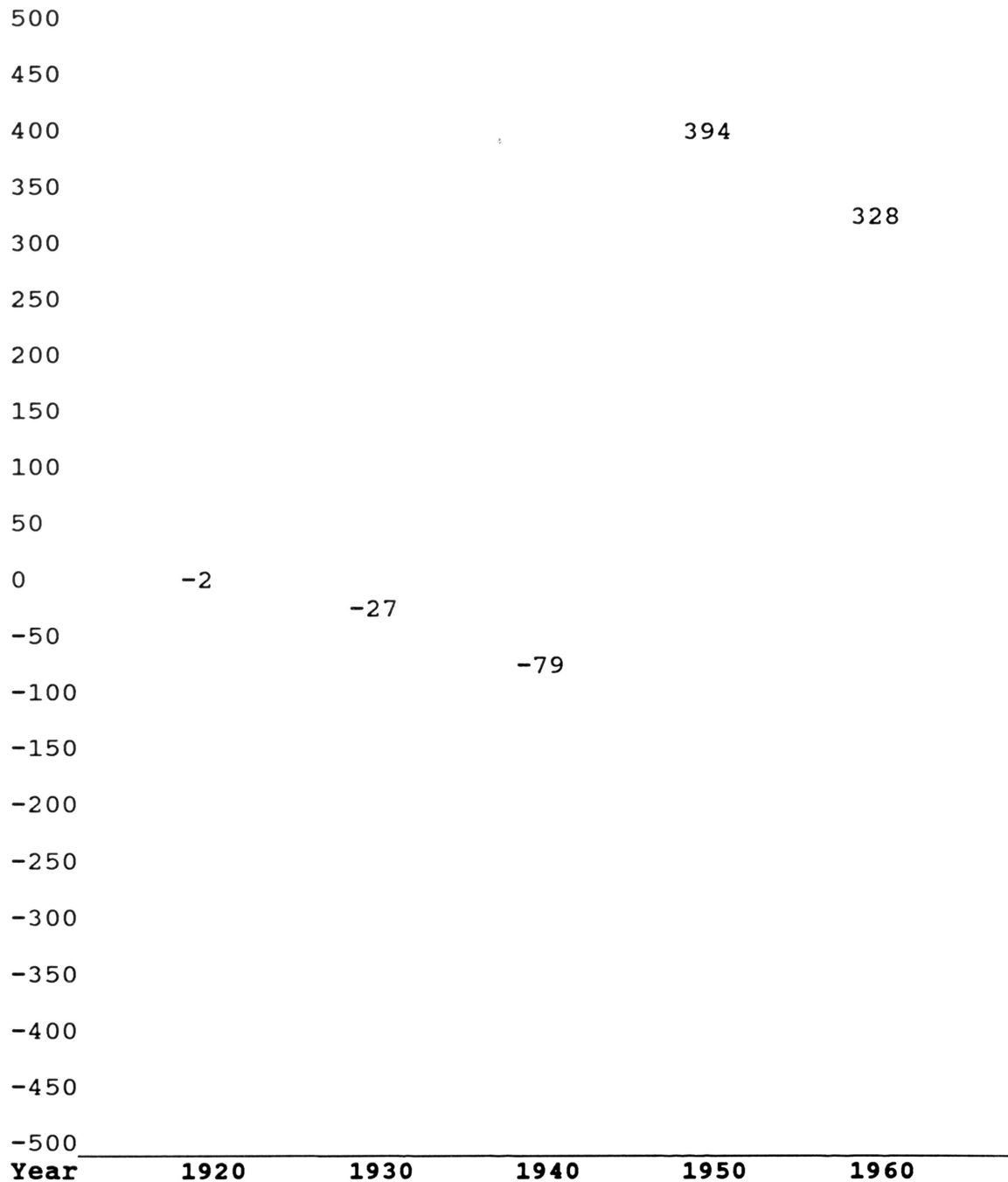
There is little variation in trade balances for the Dominican Republic, probably because it conducts such a low volume of trade. They do, however, show a slight trend toward independence over the three decades measured. Though

barely dependent in 1950, with a \$3 million trade deficit, the Dominican Republic enjoyed a trade surplus of \$69 million in 1960. In 1960, the trade surplus was a still significant one--\$42 million--compared to the earlier figures.

Thus, the Dominican Republic can be coded as independent. While the trend is not perfectly steady and has no great leaps forward or backward, it does show a fairly consistent increase in trade and no significant declines that would indicate an increase in dependency.

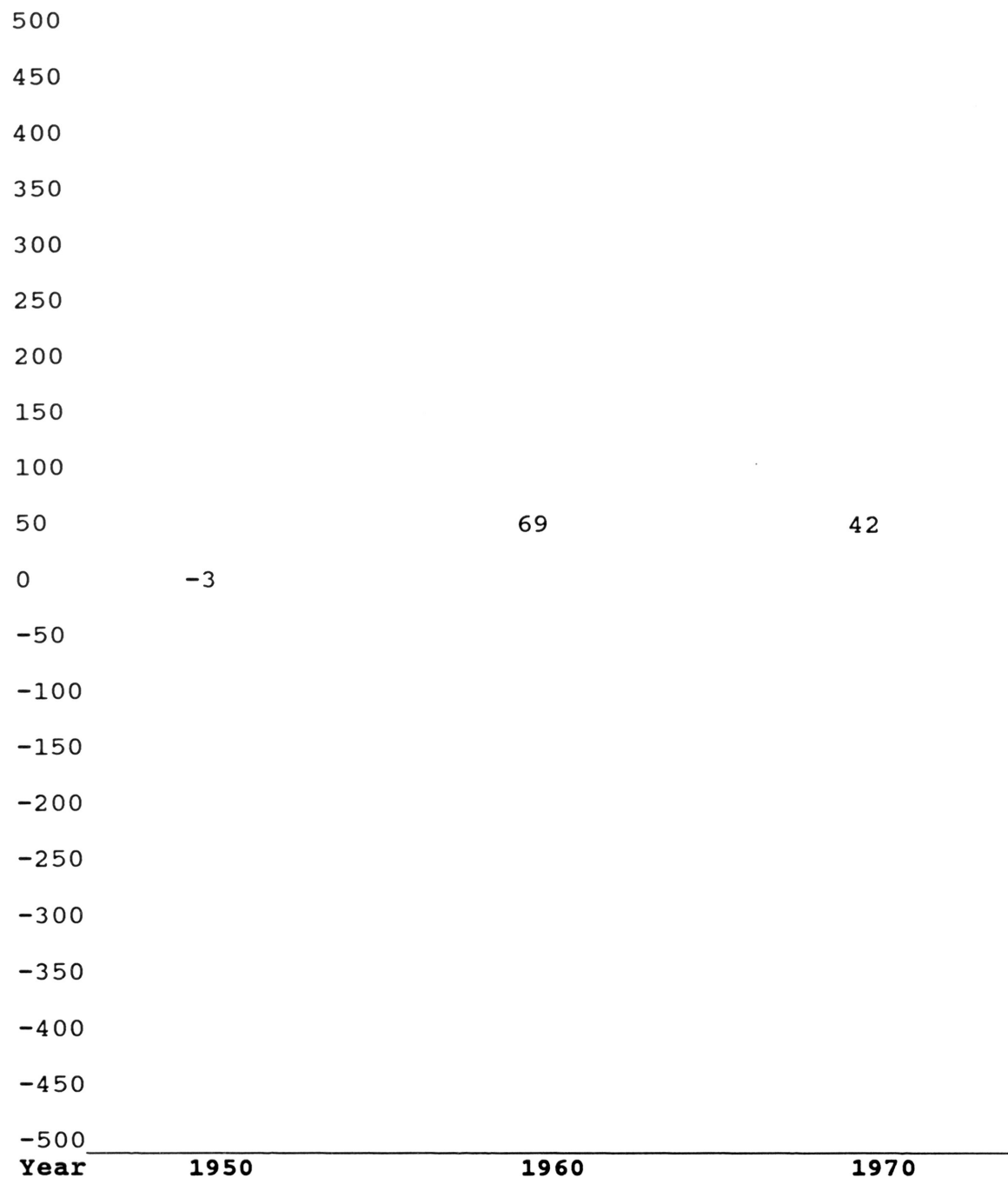
VENEZUELA: Balances of Trade with United States
Millions of Dollars
1920-1970

Balance
of Trade



DOMINICAN REPUBLIC: Balances of Trade with United States
 Millions of Dollars
 1950-1970

**Balance
of Trade**



POST-REVOLUTIONARY SOCIAL CONDITIONS

The Revolutionary Countries

Model II has the same dependent variable as Model I. Social conditions in the revolutionary countries, Mexico and Cuba were discussed at length in Chapter 2, so I will only briefly review the dependent variables here for the sake of convenience. The graphs of HEC Ranks which appear at the end of this section are the same as those which appear in Chapter 2.

Mexico

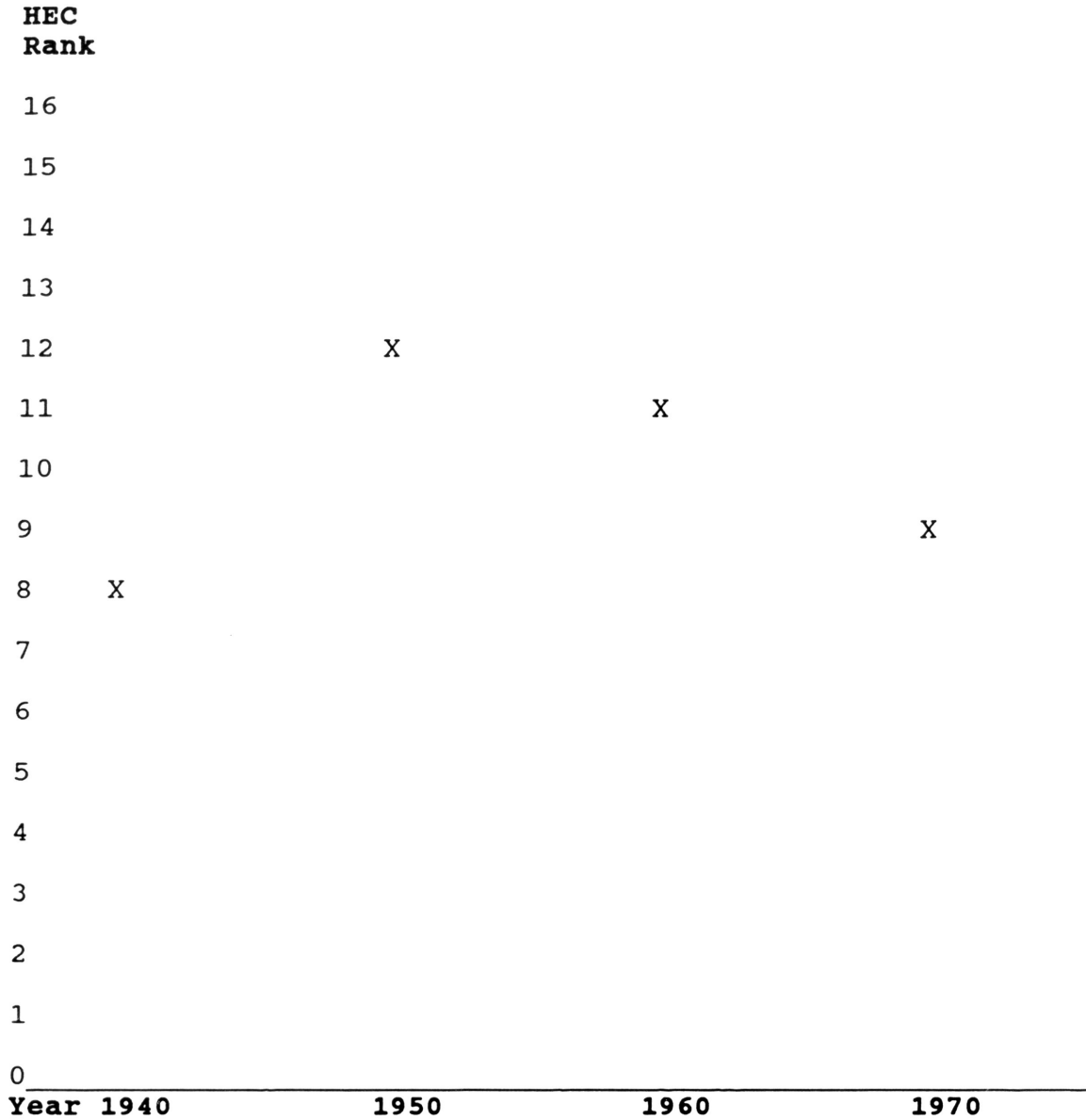
Social conditions improved in Mexico for a short time after the revolution. In 1940, Mexico had an HEC rank of 8, about midway on the scale. Its rank had improved in 1950, rising to 12. From 1950 to 1970, however, the HEC rank dropped 2 points to 10. Thus, social conditions improved in Mexico in the short term, but the overall trend is one of decline in social conditions. The following graph of HEC Rankings documents this overall trend from 1940 through 1970.

Cuba

Social conditions in Cuba appear to have a "roller coaster" history, as the graph of HEC rankings shows. Post-revolutionary social conditions, though, do climb upward fairly steadily. From an HEC Rank of 3 in 1960, these

conditions improved to a rank of 7 in 1970. This increase, combined with that discussed in Chapter 2, is evidence of improving social conditions in Cuba.

**MEXICO: HEC Rankings
1940-1970**



CUBA: HEC Rankings
1940-1970

**HEC
Rank**

16
15
14
13
12
11
10
9
8
7
6
5
4
3
2
1
0

Year 1940 1950 1960 1970

X

X

X

X

The Non-Revolutionary Countries

Venezuela

Social conditions declined steadily in Venezuela from 1940 through 1970. The trend is clear and simple, as the graph of HEC Rankings shows. Venezuela's rankings descend steadily, one point per period measured. In 1940, the rank was 7, and, by 1970, Venezuela had a rank of 4. This trend shows a consistent decline in social conditions in the country.

Dominican Republic

Data for the Dominican Republic also show a consistent decline in HEC Rankings. The ranking was 16, nearly the top of the scale, for 1940. In 1950, the rank was 15, and it had declined to 14 in 1960. Finally, in 1970, the Dominican Republic had an HEC Rank of 14. This steady progression downward represents a negative trend, and thus, decline, for social conditions in the Dominican Republic. The graph of HEC Rankings shows the decline.

VENEZUELA: HEC Rankings
1940-1970

**HEC
Rank**

16
15
14
13
12
11
10
9
8
7
6
5
4
3
2
1
0

Year 1940 1950 1960 1970

X

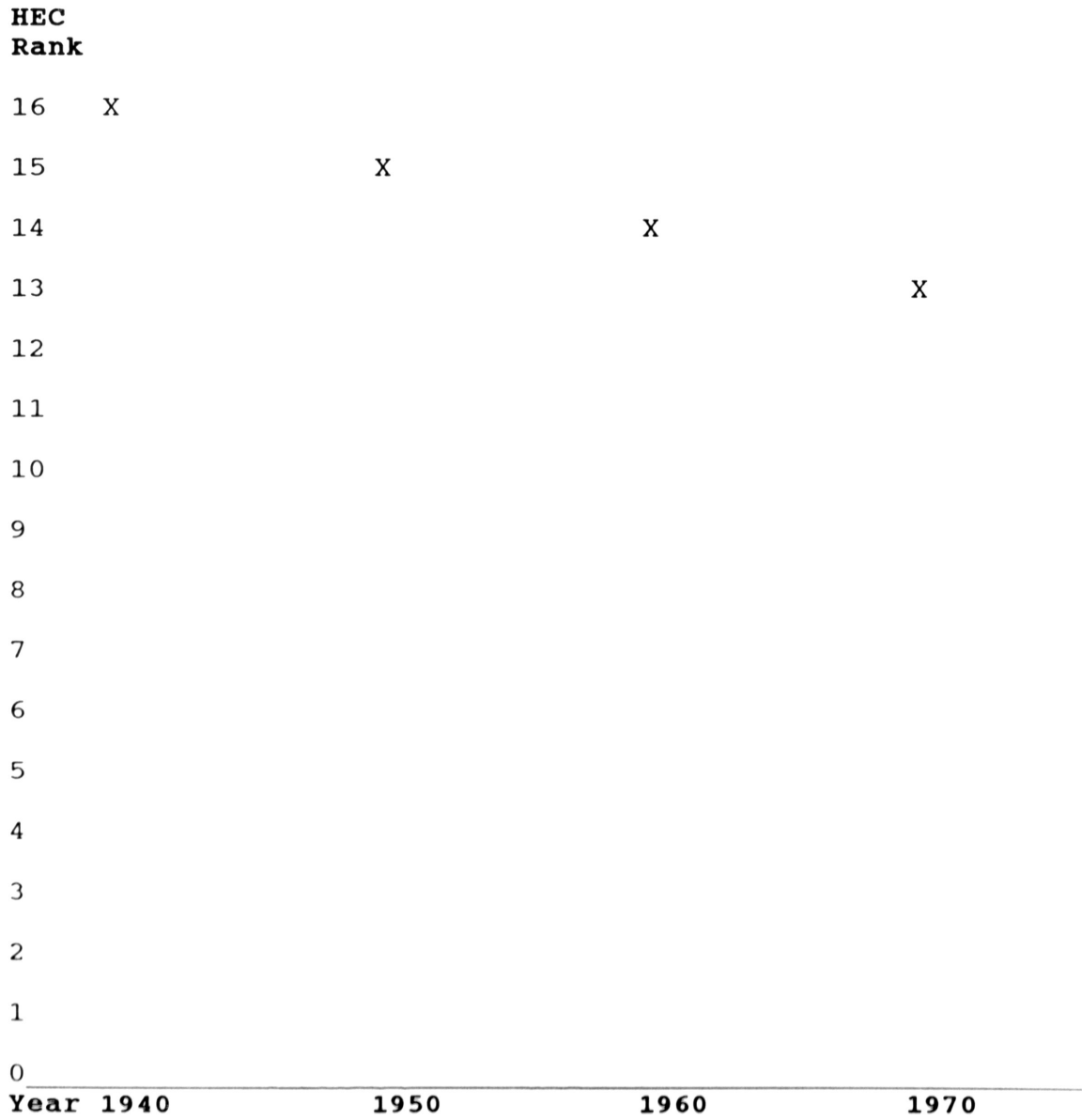
X

X

X



DOMINICAN REPUBLIC: HEC Rankings
1940-1970



RESULTS

How does dependency affect social conditions in these cases? This section examines the relationship between the independent variable and the dependent variable in each case individually and across the revolutionary/non-revolutionary parameter.

The correlation of the variables in the Mexican case is not perfect, but it does demonstrate the hypothesized negative relationship. The increase in social conditions in Mexico from 1940 to 1950 occurred at the same time as oil profits began to benefit the country. Despite these exports, Mexico remained extremely dependent on imports to meet the internal consumption demands of the population.

Since 1950 though, as Mexico's economic dependence has steadily increased, social conditions in the country have steadily declined. Thus, once the 1940-1950 improvement in social conditions is accounted for, the variables show the theorized effect. Based on this reasoning, we can preliminarily assume that dependency has caused social decline in Mexico.

In Cuba, although the trends for both variables went in the opposite direction than they did in Mexico, the variables show the same negative relationship that occurred with Mexico according to trade balances. In the decade following revolution, Cuba became increasingly independent, and we have assumed that this trend continued through 1970.

During the same period, social conditions generally improved in Cuba.

However, as mentioned earlier, when we consider Cuba's relationship with the Soviet Union, the country might best be re-coded as dependent. The relationship began shortly after the revolution and has continued for at least two decades.

Therefore, we have seen dependence in both Mexico and Cuba and opposite trends in social conditions. For the revolutionary countries, at least, there does not seem to be a strong relationship between dependency and social conditions.

In the non-revolutionary countries, the same analysis seems to be true. Generally for the period measured, we coded Venezuela as independent because of the dramatic increase in trade balances in between 1940 and 1950. Social conditions in Venezuela declined steadily for the entire period studied. As dependency declined and Venezuela achieved independence, social conditions declined consistently.

The data for the Dominican Republic show the same relationship as the data for Venezuela did. From 1950 through 1970, the Dominican Republic became increasingly independent economically. During the same period, however, social conditions declined. And, they did so at precisely the same rate as they did in Venezuela--one point on the index per decade.

Thus, the independence correlates with decline in social conditions as it did in Venezuela--as the Dominican Republic gained independence, social conditions declined.

Thus, application of Model II to these countries provides little evidence that dependency causes decline in social conditions. Dependency correlates with decline in one revolutionary country and with improvement in the other. In the non-revolutionary countries, however, independence is associated with decline in social conditions.

From these results, we cannot say that dependency has any clear effect on social conditions.

CONCLUSION

Is the hypothesis of Model II supported by these results? Since as many factors as possible were held constant across the pairs, the only difference between the revolutionary countries and the non-revolutionary ones should be revolution. Therefore, if we could see a relationship between dependency and revolution in either group, revolutionary or non-revolutionary, we would have confidence in that relationship. Yet, apparently, there is no relationship.

With these results, the strongest conclusion that can be made is that dependency has little effect, if any, on post-revolutionary social conditions. Since conditions declined in all countries except Cuba, there must be some cause other than dependency for the decline in social conditions.

Chapter 4 will review the results from each model and compare the merits of each model. It will also attempt to synthesize results and revise the original theories, offering a revised model drawn from on the cases and evidence presented in this paper. Finally, it will offer general conclusions and limitations.

CHAPTER 4

OVERVIEW

In this chapter, I will first briefly review the results from the analysis of each model. Then I will compare the models, discussing strengths and weaknesses of each, examining possible relationships between them, and suggesting an improved model. Following that discussion is a section on the limitations of the proposed revised model for revolutionary outcomes, and finally, what conclusions can be drawn from this research.

SUMMARY OF RESULTS

Model I

The application of Model I to Mexico and Cuba determined the effects of factors of the revolution itself, as opposed to external factors, on post-revolutionary social conditions. The results proved Hypothesis 1 to be weak, firmly confirmed Hypothesis 2, and provided some support for Hypothesis 3.

We found that the length of the revolution itself has virtually no effect on social conditions. This hypothesis failed because the results from Mexico contradicted the results from Cuba. The revolution in Mexico was long and produced improvement in social conditions in the short term and decline in the long term, whereas the Cuban revolution was short and produced improvement in both the short and

long term. These discrepancies across the cases indicate that the length of the revolution cannot explain outcomes in social conditions, and therefore, has no value for prediction purposes.

However, we did note in Chapter 2 that length since the revolution might have some effect. Since there was evidence of improved social conditions in the short term in both Mexico and Cuba, this requires a closer analysis. Length, when measured as time elapsed since the revolution, does seem to have an effect on social conditions.

Social conditions in Mexico began to decline only after 1950. The short term period of improvement lasted about 30 years. We only have data for Cuba for a similar short term period, but that data shows improvement as well. Thus, revolution may cause improvement for the short term only. If this is true, we would expect to see a decline in social conditions in Cuba beginning in the late 1980s.

The ideology of the revolution can explain post-revolutionary social conditions much more reliably than the original length hypothesis did. This hypothesis received the strongest support of the three hypotheses of Model I. Analysis showed that a reform ideology causes improvement in social conditions in the short term and decline in the long term in Mexico. The Cuban evidence did not support the hypothesis, but this problem was explained in Chapter 2. The effect of a development ideology could not be determined

from this research, but the results do imply that such an ideology could have the reverse effect of a reform ideology.

The evidence provided only moderate support for Hypothesis 3. We found that a revolution with mass support will likely produce improvement in the short term and decline in the long term. Cuba's revolution had elite-based support and produced improvement in the short term. However, we concluded that, elite support may cause decline in the short term and improvement in the long term, as hypothesized, in other cases. The strength of support for the revolution as an explanation of social conditions is therefore limited.

Model II

The results from analysis of Model II are much simpler than those from Model I. Model II did not show any significant relationship between dependency and social conditions in either revolutionary or non-revolutionary countries.

In revolutionary countries, dependency correlates with improved social conditions only for the short term. In the non-revolutionary countries, we found that independence correlates positively with decline in social conditions. According to dependency theorists, that correlation is somewhat illogical; theorists argue that there are distinct economic benefits from independence which should improve conditions in general in an independent country. Thus, the

decline in the non-revolutionary countries, at least, is probably not caused by dependency.

However, the possibility that revolution and dependency are related variables cannot be completely ruled out. The next section will discuss this relationship in greater detail. The variance on dependency across the revolutionary countries shows that revolution alone does not cause dependency. But it is possible that revolution, or factors of the revolution may, through intervening variables, lead to dependency.

COMPARISON OF MODELS

As stated above there may be some relationship between revolution and dependency. Thus, by comparing the models and cross examining the results, we should be able to draw some broader conclusions than each of the models offers alone. Ultimately, we should be able to revise the models and offer a more comprehensive theory to explain post-revolutionary social conditions.

First we must determine what factors in the models produce improvement in social conditions by looking at the cumulative results of Chapters 2 and 3. From Model I, a reform ideology definitely caused short term improvement. Mass support also caused short term improvement in Mexico, but elite support caused short term improvement in Cuba. Thus, as stated earlier, support is not a conclusive determinant of social conditions.

In the long term, however, no variable produced overall improvement in social conditions. The occurrence of elite support in Cuba did correlate with long term improvement, but that relationship may or may not be a causal one.

The most simple conclusion to come from this study would be that revolution causes either improvement or decline. Yet one case shows improvement, and the other shows decline. The process is apparently somewhat more complicated, and we know that the successful variables of

Model I must be related to the dependency effect
demonstrated by Model II.

REVISED MODEL

The relationship between dependency and social conditions is mitigated by the relationship between revolution and dependency. The variable that links revolution to dependency is the strongest variable from Model I--ideology. Since both Mexico and Cuba had the same reform ideology, the relationship is easier to follow.

In both Mexico and Cuba, the revolution was followed by a short period of independence. Social conditions improved in both countries during this period. This effect may be due to the emphasis which a reform ideology places on internal conditions. If the government is focusing its attention on social programs to please popular interests, it may choose not to become further involved with external actors. Leaders might choose to isolate themselves from external influences so that they may concentrate their energies on improving internal conditions.

If that assumption is true, then a revolution with a reform ideology should cause economic independence. The combination of economic independence and government spending on social programs improves internal social conditions for the short term. This effect lasted about thirty years in Mexico. However, the time elapsed since the revolution is important in this equation also.

At this point, the revised length hypothesis from Model I becomes important. It seems that the role length plays in

determining social conditions is much more like Eckstein hypothesized than Model I suggested. As Eckstein found, once a certain period of time has elapsed, the new regime must succumb to economic development issues which require more service to the middle and upper classes. The regime may attempt to service development demands by inviting foreign investment, foreign aid, and foreign loans. All of these tactics lead to economic dependence, which occurred in Mexico around 1950.

After 1950, Mexico's dependence correlates well with its decline. This suggests that the dependence does cause decline. But how does this new model work for Cuba?

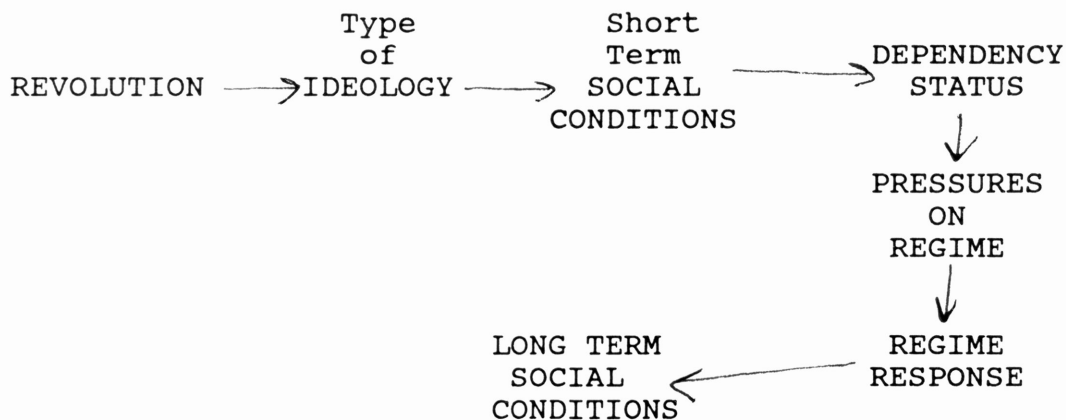
Cuba's revolution also had a reform ideology and short term improvement in social conditions. While it was slightly dependent at the time of the revolution, it gained independence as soon afterward. There was a time lapse before it became dependent on the Soviet Union, yet this lapse was not as great as the lapse between independence and dependence for Mexico. Nevertheless, if the model is accurate, we should soon see a decline in Cuba's social conditions.

One factor, which we did not examine, which may have some influence on social conditions is regime type. Thirty years after the revolution, Mexico and Cuba have very different forms of government. Mexico has something which resembles a democracy, while Cuba is controlled by a communist regime. This difference may explain the slight

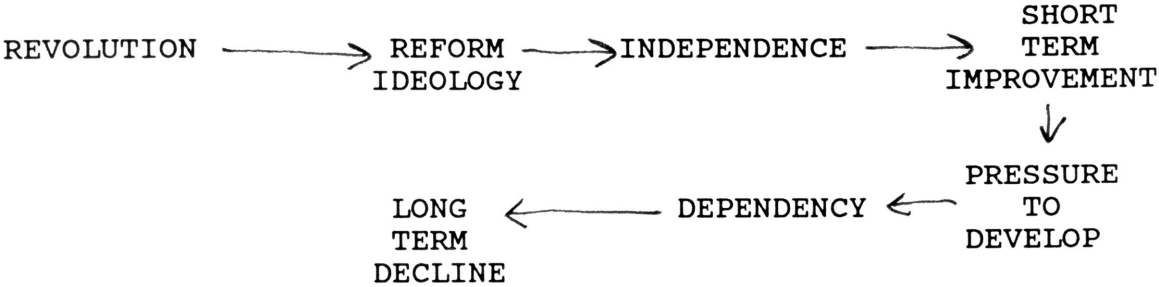
difference between the countries in short term social conditions. Cuba has had a more significant improvement in the short term than has Mexico.

This difference lends support to Eckstein's argument that the state does play an important role in determining post-revolutionary social conditions. Eckstein found that regimes which control the means of production, as does the regime in Cuba, have a greater ability to redistribute wealth and redesign health care systems. Their control of economic surplus enables them to succeed at these social objectives. In the long term, Cuba may not face the hypothesized decline and succeed at continuing to improve social conditions where Mexico failed.

The revised model appears below:



The application of this model to the Mexican case is depicted below:



THEORETICAL and METHODOLOGICAL LIMITATIONS

This theory is limited in its applicability to other revolutionary countries. This section will discuss the many reasons for this limitation

Most importantly, the case selection for this study was limited to Latin American revolutions. While all regional factors were held constant by selecting only cases from Latin America, the results may not work in other regions of the world. One indicator of this limitation is the evidence provided for Model II. All of the countries studied under Model II experienced decline in social conditions with the exception of Cuba. Therefore, decline in social conditions may not be a direct result of revolution, but it may be attributable to some other regional factor such as international debt.

The availability of data was a persistent obstacle to this research. Comprehensive, consistent, and reliable quantitative economic and demographic data on Mexico before the 1920-1930 decade simply does not exist. Cuban economic data was limited by government withholding of figures.

To overcome these problems, I made certain assumptions which were noted in the text. The significance of these assumptions is rather great. Therefore, the theory may only be as true as these assumptions.

In addition, the sample consisted of only two revolutionary countries. An N of two allows very limited

generalizability to other cases. The cases studied may be unusual ones which are not representative of revolutionary countries in general. This problem is further compounded by the fact that the revised theory only truly applies to Mexico. There has not been a large enough time lapse since the Cuban revolution to adequately test the theory on that country. The Cuban case seems to be following the path of the revised model so far, but it may not in the future.

The coding of the independent variables in Model I is admittedly somewhat subjective. This problem may also have skewed the results of this study. If this research is repeated, more precise definitions and measures in Model I would increase the validity of those results.

Similarly, this research would benefit from more accurate definition and measure of the independent variable of Model II. A measure which is less limited in scope than trade balances with the United States would add validity to the results from Model II. Ideally, an index of multiple measures of dependency would maximize validity for the independent variable.

There are a multitude of other factors which could cause post-revolutionary social conditions which this research overlooked. Further research on this topic should encompass these factors. These might include the type of revolution, the timing of the revolution, the type of post-revolutionary ruler, the form of government instituted, and others. Obviously, one study cannot cover every possible

factor that might affect the dependent variable, and this study took a very narrow focus by trying to isolate two types of factors and compare their influences on social conditions. Further research should consider other types of factors as well as other variables which might fit into the two models here but were not mentioned.

CONCLUSIONS

This research offers a model to explain the effect of third world revolution on internal social conditions. The theory classifies revolution according to the ideology during and after the revolution. It argues that revolutions with reformist ideologies will produce improvements in social conditions in the short term. Pressures for economic development will later lead the regime to undertake measures which lead to economic dependency. Dependency drains financial resources, and governments must cut social program funding, leading to long term decline in social conditions.

The theory adds to the body of knowledge of social science with both its explanatory and predictive powers. This theory suggests that the ideology of revolution and the time lapse since revolution, in conjunction with dependency, have some influence on the long term post-revolutionary social conditions. These findings provide a fairly good theoretical base for explaining both the short and the long term effects of other revolutions. This research has also provided a good basis for further study of revolutionary effects.

When used as a preliminary model for prediction, this study should help forecast effects of future revolutions. It suggests that reform ideologies do tend to produce short term improvement in social conditions, but it warns that

governments with these ideologies may be susceptible to dependent economic relationships later on.

Many theorists have proposed that post-revolutionary social conditions are caused by factors of the revolution, and dependency theorists have argued that the economically binding force of dependency cannot be overcome by revolution. This model attempts to synthesize and reconcile these two contending theories into one explanation of post-revolutionary social conditions. In doing so, this study has helped close the gap between revolution theory and dependency theory. It has shown that dependency probably has a more limited effect than Cardoso and Faletto contend. It also shows that some factors of the revolution, such as the class-base of support, may not have as much influence as previously thought.

Therefore, while this study contributes some moderately reliable conclusions, it also sheds light on further contradictions in political theory. Further research is necessary to either strengthen or refute the conclusions offered here.

In addition to benefitting the social sciences, this research provides valuable policy implications for revolutionary governments, foreign governments, other foreign aid donors and MNCs. While this model does not predict all of the economic dangers of running a post-revolutionary government, it does explain why some revolutions seem to have "failed."

Post-revolutionary governments should be aware of the future consequences of their economic strategies and make their choices wisely to avoid the trap of dependency. Foreign governments and aid donors concerned with the issue of dependency and its effect on internal social conditions may also benefit from this research by pursuing policies to prevent the accumulation of economic dependents or encouraging certain ideologies and regime types following a revolution. Foreign aid can be provided in accordance with the political objectives of donors without creating situations of dependence. Finally, MNCs may benefit from this research by investing responsibly in post-revolutionary countries which are in a precarious economic position.

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