

The Children of the Isle of Youth:  
Impact of a Cuban South-South Education Program on Ghanaian Graduates

by

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B.A., BC Open University, 1999  
MBA, University of London, 2002

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## DOCTORAL ABSTRACT PAGE

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### ABSTRACT

This dissertation examines the manifestations of the development discourse in the context of a bilateral South-South program of educational assistance through scholarships provided by the Cuban government at the secondary and postsecondary levels to students from Ghana. The research assesses the meanings attached to this program on the basis of the observations, understandings and perceptions of a group of graduates, and of former administrators who were involved in the design, implementation and/or administration of the program. The study gives legitimacy to the perspectives of a distinct group of knowers in a country of the postcolonial Global South who were socialized into an educational model that differs from the educational context of their home country.

The research aims to illuminate the links between the program graduates' experiences with the Cuban program and their subsequent contributions to Ghanaian

society, with particular emphasis on the process of their reintegration. Research questions focus on the study participants' perceptions regarding the relevance of the Cuban education in regard to academic and practical preparation; the combination of liberal and utilitarian principles of education; access opportunities; and ways in which the Ghanaian government may have encouraged the graduates' return to Ghana in the context of the global brain drain phenomenon.

Upon their return to Ghana, the graduates encountered challenges with respect to cultural disorientation due to the partial adoption of Cuban norms and values. They experienced difficulties integrating into professional life based on a perceived lack of understanding of certain Cuban credentials among Ghanaian employers, and encountered discrimination based on their education in an Eastern Bloc country. Once they had overcome the initial challenges, the graduates felt that the technical and professional aspects of their education, in particular the strong applied focus of their study programs, were well aligned with the Ghanaian context. There was evidence that early recruitment at the secondary level and a defined recruitment strategy resulted in program participation across the 10 Regions of Ghana. A distinct subgroup of graduates currently residing in the Bahamas provided insights into the reasons for their non-return to Ghana or their decision to leave their home country again.

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## Dedication

This dissertation is dedicated to the former students, teachers and administrators of ESBEC #22 in Cuba's Isla de la Juventud, to their courage and determination in undertaking and participating in a unique educational project. The work is also dedicated to the people of Cuba who welcomed the Ghanaians and generously provided them with a home away from home.

*A lantern on a pole*

*I stretched out my arm  
 In the dark of the night of our country.  
 I touched nothing.  
 But I knew what was ahead  
 Beyond my five senses:  
 That at least for the immediate future,  
 Barring the mischief of chance against faith,  
 Our way was clear:  
 Whatever impediment is wrapped up  
 In the dark  
 Against progress  
 Is a little way away from us –  
 Beyond an arm's length.  
 What makes our length.  
 What makes our steps so sure  
 And unfaltering is a trailing sheen  
 Of memories left behind by those who have  
 Used the same way long before us.*

(By Ghanaian poet Kwesi Brew, from the anthology *Return of no return and other poems*, 1995)

## Chapter 1 – Introduction

*The West is living in a triumphant euphoria. The collapse of the East provides it with a perfect alibi: in the East it was worse. One should, instead, wonder whether it was fundamentally different. In the West, justice is sacrificed on the altar of the goddess Productivity in the name of liberty. In the East, liberty was sacrificed on the altar of the goddess Productivity in the name of justice. In the South we can still ask ourselves if this goddess is worth our lives.*

*(Eduardo Galeano, “On the Altar of Productivity”)*

In this study, I examine the meanings and manifestations of the development discourse as experienced and reported by a group of Ghanaian students and administrators who were involved in a South-South program of educational assistance by the Cuban government through a scholarship scheme provided at the secondary and postsecondary levels to students from Ghana. I undertook this project to assess whether, and if so, the extent to which the Cuban education was perceived to have provided these Ghanaian students with an education that was responsive to Ghana’s development priorities and societal needs. The study is situated within the complex web of relationships formed by the themes of brain drain and brain circulation; the links between postsecondary education and development; and horizontal models of collaboration between lesser industrialized countries in a postcolonial environment.

### **Statement of the Research Problem**

In spite of several decades of development assistance and co-operation provided mostly by highly industrialized countries to lower-income countries, the gap between richer and poorer nations has grown wider in the past two decades. Although a few developing countries with large populations have started to catch up with the wealthy nations, a large number of lower-income countries have experienced widening economic

inequalities. These inequalities exist both in regard to inter-country comparisons between developing countries and more industrialized regions of the world, as well as between rich and poor citizens within those countries which host an ever-growing segment of impoverished and marginalized peoples alongside the nouveau riche elites (Burbach, 2001; United Nations Development Programme [UNDP], 2007). According to the United Nations Human Development Report 1998 (as cited in Burbach), the combined assets of the world's 225 richest individuals equalled the annual income of the poorest 47% of the global population. The United Nations Human Development Report 2005 indicated that the assets of an average American in 1990 were 38 times those of an average Tanzanian. By 2005, the average American was 61 times richer than the Tanzanian.

One of the criticisms directed at the traditional form of development collaboration is the inadequacy of an approach that perpetuates historic relationships of core and periphery, where the core is a high-income former colonial power, and the periphery a lower-income former colonized society. The relationship of core and periphery implies an ongoing dependence of the latter on the former through economic control mechanisms that have continued after the former colonies gained political independence. Critics of development programs argue that such interventions ultimately do not benefit the recipient countries, but ensure the ongoing hegemony of the donors by keeping the former colonies in a state of dependence that allows the industrialized world to dictate terms of trade (e.g., tariffs, prices of raw materials) that are advantageous for the rich nations and disadvantageous at best, and disastrous at worst, for the poor. In fact, it could be argued from a postcolonial perspective that policy makers in the industrialized part of the world deliberately keep the majority population in lower-income countries at their

current levels of development in order to ensure the ongoing privileged status of the richer nations. In the words of Galeano (2005), “the precarious equilibrium of the world, which is poised on the brink of an abyss, depends on the perpetuation of injustice. The deprivation of the majority is necessary so that the waste of a few is possible” (p. 215). Several aspects of development assistance substantiate the claim that such “assistance”, which amounts to economic control mechanisms, benefits the donor more than the recipient through:

- (1) “Tied aid”: the tendency of donor countries to award contracts to their own nationals, resulting in a large percentage of development funds flowing back into the donor economy rather than benefiting the recipient country.
- (2) Conditionality: one of the best-known examples of conditional aid are the structural adjustment loans that squeezed the public sector in many lower-income countries and resulted in huge budget cuts in the health and education sectors.
- (3) Technological mismatch: the tendency of donor countries to apply technologies developed and suitable for industrialized nations in lower-income parts of the world where socio-structural, infrastructural, climatic and other conditions do not allow for effective use of such technologies.

This situation has been well summarized by Todaro (1989) who argued that donor countries give aid primarily because it is in their political, strategic, and/or economic self-interest to do so. ... there is no historical evidence to suggest that over longer periods of time donor nations assist others without expecting some corresponding benefits (political, economic, military, etc.) in return. (p. 485)

Development assistance in the form of educational scholarships poses a particular challenge in this regard. The use of scholarship schemes for political purposes became quite common throughout the last century, in particular after the Second World War. Throughout the Cold War, the Soviet Union and the U.S.A. were vying for African students through generous scholarship programs in order to prevent the spread of the “enemy’s” ideology in the newly independent African nations (Samoff & Carrol, 2003). The practice of counting developing country students studying on scholarships in higher-income countries towards the latter’s official development assistance fails to acknowledge that this form of education assistance is at least partly motivated by policies promoting the host institutions’ internationalization efforts, rather than making a genuine contribution to development (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2004).

After the end of the Cold War and in light of current demographic developments in most industrialized nations, a new rationale for providing education in higher-income countries to students from other parts of the world has emerged. A shrinking and aging population base in many parts of the developed world leaves those countries in need of a young and skilled workforce to avoid critical labour shortages in the near future. International students are being targeted as potential immigrants after graduation. In a recent research paper, the Canadian Bureau for International Education ([CBIE], 2007) has expressed concerns about their perception that “somehow we were not capitalizing on the immense talent represented by the international cohort [of students]” (p. 1). After outlining the current labour market situation in Canada, the authors of the CBIE report

concluded that “shortages of the magnitude described above threaten the position of privilege that Canada has enjoyed in the world” (p. 6).

While obviously only a small minority of international students study in Canada or other higher-income countries on a scholarship, the new and more aggressive immigration policies are applied to students regardless of background, country of origin, or source of education funding. Some scholarship models require students to sign contracts with return clauses, but enforcement of such clauses is impractical. Students frequently return home for a short period of time and apply for permanent resident visa from there, thus technically fulfilling the return condition. Students on scholarships from their home countries might apply for post-graduation work permits from within the host country, and there are currently no international laws in place that would allow the students’ home countries to demand or enforce the students’ return. Contracts with return clauses therefore constitute little more than a moral obligation.

The problem with educational scholarships at the tertiary level is further exacerbated by the fact that such scholarships typically only reach a tiny minority of students in developing countries. Apart from the limitations imposed by the relatively small number of scholarships that are available, Todaro (1989) outlined that “one of the major educational problems of developing nations is the very high percentage of students who drop out before completing a particular cycle” (p. 334). This means that not only are few students receiving such scholarships, but also that those few have already beaten the odds and have stayed in the education system to receive a high school diploma. In many developing countries, a large proportion of students never move beyond primary education. Universal secondary education is still far from a reality in most regions of

Sub-Saharan Africa (UNESCO, 2004). Ghana, for example had a secondary gross enrolment ratio of less than 40% in 2001. As more students drop out in the course of their junior and senior secondary years, the pool of potential entrants into tertiary education, and thus the pool of potential scholarship recipients, shrinks.

An imbalance exists in many of the poorest countries between the social and private costs and benefits of education (Todaro, 1989). Private costs are educational expenses borne by the individual and her/his family, whereas private benefits accrue to an individual from such education in terms of, for example, a more prestigious job and better salary. Social costs and benefits refer to societal expenditures for educating a nation's citizens (e.g., infrastructure such as schools and universities), on the one hand, and benefits accruing to society such as the availability of a highly skilled labour pool for the provision of services in various parts of the economy, on the other. Applying return-on-education calculations, economists have in the past argued that this imbalance is the result of an over-investment in tertiary education and an under-investment in primary education. Based on a 1972 study, Todaro argued that while in lower-income countries a “[postsecondary] student costs 87.9 times as much as a primary pupil to educate for one year, the university student on the average earns only 6.4 time as much as the typical primary pupil – a very high (and often artificial) differential, but not as high as the cost differential” (p. 336). These ratios are likely more or less accurate, however, donor countries have over the past 30 years acted upon such computations with policies that have proved problematic for lower-income countries. Based on the argument presented above, donor countries heavily focused their development assistance at the primary level to the detriment of higher levels of education. The argument, however, is flawed in that it

compares the social costs of education with the private benefits accruing from such education. It fails to take into account the social benefits of education at the postsecondary level, in particular the benefits of technical/vocational certificate, diploma and degree programs that are vital to developing economies. The development argument thus tends to be framed around the question of which level of education to develop over another, rather than a recognition of the need to build capacity at all levels of education as an integrated, ladder approach to strengthening a country's education system in proportion to its economic needs.

The neglect of the secondary and postsecondary sectors by many donor countries and limitations imposed through structural adjustment loans on developing countries with regard to funding of their own postsecondary sector has led to a shortage of post-primary educational opportunities for many developing country citizens. Those few with the necessary economic means or the luck of obtaining a scholarship started moving to industrialized regions of the world for their postsecondary education, often staying behind as immigrants upon graduation. The true imbalance in the cost-benefit calculation at the level of society, however, arises from those who are trained at considerable expense in their home country and subsequently move to a higher-income country which gains the benefits of a skilled labourer at zero cost. The figures speak their own language: Ghana, for example, lost more than 500 nurses to work in higher-income countries in the year 2000, equivalent to more than twice the number of nurses who graduated from nursing programs in Ghana in that particular year (Buchan & Sochalski, 2004). In the past decade, Ghana has lost 50% of its professional nurses to the industrialized world, and Ghana also has more doctors working outside its borders than in the country itself

(Nullis-Kapp, 2005). The vacancy levels for 2002 in the Ghana Health Service showed a shortfall of 65%, 68%, and 56.6%, for doctors, professional nurses, and pharmacists, respectively, when comparing the staffing status during that year with the ideal staffing (Nyonator & Dovlo, 2005).

The research problem investigated in this study is situated within the above themes of development assistance in the education sector, migration from lower-income to higher-income regions of the world, and the development of a country's educational sector concomitant with economic needs and realities. In light of the dilemmas associated with traditional development assistance, South-South collaborations between postcolonial societies have been advanced as one possible solution towards more adequate ways of providing development assistance. The rationale behind this thinking is that postcolonial countries are structurally and historically sufficiently similar to make this type of horizontal collaboration meaningful in their societal context; yet, they are also economically and structurally sufficiently differentiated and endowed to be able to help one another.

In this study, I have examined the impact of an educational scholarship program provided by one developing country (Cuba) to another developing country (Ghana) at the secondary and postsecondary levels, as experienced by a selected group of program graduates and administrators involved in different program aspects. I have carried out this research against the background of four distinct, but interrelated themes which I have discussed in detail in chapter 2 of this dissertation: brain drain and brain circulation through migration; the link between tertiary/postsecondary education and socio-economic development; South-South development; and the postcolonial stance. The Cuban model

offers a unique opportunity to empirically examine the linkages between these topics because the Cuban scholarship program was specifically designed to ensure that students from developing countries received assistance in a novel manner, with the explicit aim to return this investment into their own societies. The Cuban model of tertiary education scholarships constitutes a challenge to the brain drain phenomenon by actively encouraging the return of graduates to their home countries and requesting that they employ their skills toward the betterment of the human condition in their own societies. The study provided insights into the reported impact of the Cuban intervention on a group of Ghanaian graduates, in particular their inclination to return to Ghana and contribute to the country's development process, rather than migrating to locations in the industrialized world.

### **Purpose of the Study**

Although there are diverging views and theories regarding the links between education and a country's social and economic development, most scholars would agree that some correlation exists between the two. As outlined in the statement of the research problem above, education is therefore one of the sectors on which development assistance programs have traditionally focused. One of the major achievements of such programs, provided by bilateral and multilateral donor agencies in the industrialized world to low-income countries, has been a considerable increase in the percentage of the global population who achieve basic levels of education and literacy. However, as described earlier, secondary and tertiary enrolment and graduation levels have not kept pace, and the widening gap between rich and poor countries, and rich and poor people, demonstrates that the achievement of universal primary education alone does not

contribute in a significant way to the betterment of the human condition for the majority of the population in developing countries.

Critical postcolonial theorists may argue that Western-inspired education systems exported to the Majority World are bound to fail in making any meaningful contribution to those societies' needs precisely because they are a covert continuation of the earlier overt political form of colonialism. Rahnema (2005) postulated that development constitutes colonization from within, and that the school system is one of the most effective strategies of this new form of colonization. This process is said to work in that the West successfully markets education as a scarcity that everybody is trying to achieve, without the recipients realizing how this process converts them into "consumers" of Western worldviews and behaviours that are ill-aligned with the recipient countries' human needs (Rahnema). In this view, education in the developing countries of the world, modeled and frequently financed by donors in industrialized countries, serves the needs of the latter rather than the former through producing willing collaborators in a globalization scheme that keeps those at the top at the top, and those at the bottom at the bottom.

The Cuban educational collaborative model with other developing countries purports to follow a different, and supposedly purely altruistic, motivation in extending development assistance to its Southern partners. It challenges the development aid strategies that grew out of the colonial era and that involve the flow of technical or financial assistance from the North to the South. Such technical and financial assistance comes with an array of terms and restrictions, Western forms of knowledge and power, and expert consultants who, as the bearers of such power, are the heirs to the colonial

masters and administrators. At the same time, the benefits flowing back in the other direction from the developing to the developed countries are the same ones which the latter used to receive under colonial rule: cheap exports of raw materials; surrender of people's vernacular culture and languages; and a populace hungry to imitate Western consumption patterns and thus provide a ready market for European and North American exports. In this context, Escobar (2005, p. 89) remarked that

Although the [development] discourse has gone through a series of structural changes, the architecture of the discursive formation laid down in the period 1945-55 has remained unchanged, allowing the discourse to adapt to new conditions. The result has been the succession of development strategies and substrategies up to the present, always within the confines of the same discursive space.

The Cuban model involves a South-South or horizontal flow of assistance to countries with similar socio-economic structures. While the strategies employed by the Cubans constitute an alternative to those employed by the dominant development discourse, it is less clear as to whether these strategies have the ability to fundamentally alter the discursive architecture, or whether they simply constitute a different substrategy within the dominant discursive framework. In particular, the Cuban program does not appear to include indigenous educational philosophies of the countries in which scholarship students reside and may thus be seen as an alternative, socialist version of a modernist educational model. The overarching purpose of this study is therefore to examine the meanings and manifestations of the development discourse in the context of a bilateral South-South program of educational assistance by the Cuban government through a scholarship scheme provided at the secondary and postsecondary levels to

students from Ghana. I have examined the meanings attached to this program on the basis of the observations, understandings and perceptions of a group of program graduates and former administrators involved in the design, implementation and/or administration of this bilateral program.

The study builds and expands upon earlier work undertaken by Hickling-Hudson (2000a) on the contribution of Cuban higher education to postcolonial development in the Caribbean region. During the period 1993 to 1996, Hickling-Hudson explored “the impact of the scholarships on expanding access to tertiary education in the English-speaking Caribbean, ..., (explored) the scholarship holders’ accounts and views of the education they received in Cuba, and (considered) the significance of the work they do in their countries of origin as Cuban-trained graduates” (pp. 190-191). Hickling-Hudson concluded that the participants in her study all worked in “influential professional positions vital to the socio-economic development of their home countries” (p. 200). Given that the focus of her research was in the Caribbean, she pointed to the need for further research in this field applied to other countries in order to examine the relationship between tertiary education and economic development.

This study enhances Hickling-Hudson’s work along a number of dimensions. First, in her research, Hickling-Hudson explored the ways in which the education of Caribbean students in Cuba tended to influence their work and careers. Postcolonial countries have certain similarities, but also differ in their socio-economic and political structures. In this context, I asked myself whether the same educational interventions would have similar affects to those observed for Caribbean students on students in other countries Because Hickling-Hudson carried out her research in the Caribbean region, extending the research

to an African country enabled me to frame Cuba's contribution in a different contextual setting.

Second, Hickling-Hudson's research focused exclusively on Caribbean graduates from postsecondary programs in Cuba. Extending the research to graduates who studied in Cuba at both the secondary and postsecondary levels illuminated the impact of an earlier exposure to the work and study principle and of Cuba's formative goal to integrate the world of study with the world of work throughout the whole education system. Conducting a study with participants who were recruited into the program as children or young teenagers also provided an opportunity to interrogate the possible impact of such an educational model in light of high attrition rates between different levels of education for economically disadvantaged children in Ghana now and then.

Third, Hickling-Hudson's research participants were either recent graduates from Cuban postsecondary institutions, or were still students in Cuba. Broadening the research to participants who left Cuba up to 18 years ago provided a more detailed picture of this group of former students' life trajectories and the longer-term impact of their Cuban experience after return to their home country.

Finally, including a subgroup of research participants who did not return to their home country after graduating from Cuban institutions, or who subsequently left their home country, shed light on the factors that motivated some to follow that path, and others to return (and stay) back home. This particular aspect provided initial insights into similarities and differences in behavioural patterns of students who receive an education outside their home country. It addressed a question raised by Carnoy and Samoff (1990) as to the extent to which the collective aspect of Cuban education achieves its goals with

respect to graduates being primarily guided in their behaviour by collective, society-oriented aims, and the extent to which young people educated in Cuba are also motivated by more individualistic goals similar to their counterparts in capitalist societies.

Ultimately, finding some answers to these questions contributes to the ongoing debate about brain drain and brain circulation, and the impact of the flight of skilled professionals from developing regions of the world on their home societies.

Based on the purpose outlined above, I formulated specific research questions that I aimed to address in this study, as detailed in the next section.

### **Research Questions and Focus of Study**

At one extreme, critics have argued that the Cuban scholarship program is nothing but an attempt to politically indoctrinate young and impressionable students from a wide variety of countries to spread the idea of socialism. It could also be surmised that the program constitutes an attempt to create some moral or economic indebtedness on the part of source countries towards Cuba, and thus help secure Cuba's somewhat fragile international trade and diplomatic position (as outlined, for example, in Eckstein, 1985). At the other end of the spectrum, it has been claimed that the Cuban program makes a significant contribution to postcolonial development in the graduates' home countries (e.g., Hickling-Hudson, 2000a; Martín Sabina, 2002; Richmond, 1986).

This is a complex intellectual puzzle to which there is no definitive answer in a positivistic sense. In keeping with my philosophical and epistemological beliefs about the nature of knowing, as well as my conviction that any processes towards betterment of the human condition in societies need to be endogenously determined and understood, the primary focus of this study is to illuminate the links between the study participants'

experiences with the Cuban scholarship program and their contributions to the development process in Ghana. In the context of this study, these links are examined through the process of reintegration into Ghanaian society, as reported by the study participants.

My inquiry is guided by the following research questions:

- (1) How significant and relevant do the Ghanaian graduates, interviewed for this study, perceive their Cuban education to be in the Ghanaian context, considering the geographic distance and socio-economic, linguistic, political and cultural differences between the two countries?
- (2) To what extent do the Ghanaian graduates and former program administrators report seeing this program as successfully combining liberal and utilitarian principles of education?
- (3) What do the study participants believe to be the impact of combining secondary and postsecondary studies in this South-South educational assistance model? Do the participants feel that this model provided opportunities for students from diverse socio-economic backgrounds?
- (4) To what extent do the graduates perceive a link between the kind of contribution they are making through their careers, and the emphasis on human development and altruism that they experienced through the Cuban educational philosophy?
- (5) In the view of the study participants, was the students' education in Cuba relevant to Ghana's development priorities? How do the interviewees perceive the graduates' reintegration into Ghanaian society in relation to Ghana's societal institutions, employers, and Ghanaian society at large?

- (6) Were the participants aware of any government-initiated strategies to encourage the graduates to return to Ghana at the end of their program? How did the study participants perceive the nature and/or impact of these initiatives?
- (7) Does the study raise any other issues with regard to educational scholarships between the countries of the Global South?

## **Background of the Study**

### **Historical Context Cuba**

#### General Educational Context

For the purpose of this study, it is most useful to examine the context of education in Cuba starting with the Cuban Revolution in 1959. After the Revolution, the Cuban leadership made a clear commitment to education as a basic right to be provided free of charge at all levels. Richmond (1990a) described Cuba's education system as one which "proclaims not only the possibility of establishing mass education in a developing country but also ... the necessity to reform radically the educational process so that it becomes an effective contributor to national development, social welfare, and popular mobilization" (p. 70). The Cuban model entails a closer alignment of education with the social economy of a predominantly rural and agricultural society, in particular through a change in "social attitudes towards manual labour, rural life, agricultural occupations, and the role of women" (p. 71).

The democratization of education through mass mobilization of the populace in the implementation of educational policies has involved a variety of institutions and organizations, such as schools and political organizations, trade unions, and mass organizations, for example, the Federation of Cuban Women and the Committees for the Defence of the Revolution (Richmond, 1985). Post-revolutionary educational change and

mass education fulfilled some of the revolutionary goals of mass economic participation and mobilization (Carnoy & Samoff, 1990). It has to be noted that democracy in the Cuban educational context has a different meaning from the word democracy in the context of capitalist societies: It is largely seen in terms of economic equality and equal distribution of society's resources (Carnoy & Samoff).

The most important changes to the education system that occurred during the first 15 years after the Revolution are as follows:

- National literacy campaign
- Extension of educational services to the whole country through building of new facilities
- Teacher training
- Employment guarantees for all teachers
- Free and public education for all
- Abolishing of private universities (Martín Sabina, 2002).

At a broader level, looking back at the main themes in Cuban education since the Revolution from the vantage point of the beginning of the last decade, Richmond (1985; 1990b) summarized the main themes around Cuba's educational approach as follows:

- Ideology and the educational process: the "new man" ideology (cultivation of a new political culture)
- Democratization of education: increased access for the masses to education and reduction in educational inequalities as a substantive (i.e., adequately resourced) and not just formal commitment

- Relationship between education and economic development: work-study schemes and technical/vocational education
- Combination of work and study: applying the work-study principle at all levels and in all types of education
- Problems and deficiencies of the educational system: constant striving for improvement of curricular components and standards, and elimination of inefficiencies
- Educational innovation and initiatives: literacy campaign, schools to the countryside and schools in the countryside.

After the educational system had been put on a new track during the 15 years following the Revolution, the second important shift occurred between 1975 and 1980 in the form of the *Plan de Perfeccionamiento del Sistema Nacional de Educación* (improvement plan for the national system of education) which provided for far-reaching changes to the school system. The plan's primary purpose was to achieve a more integrated educational system that allowed for seamless articulation between its various subsystems (Richmond, 1990b). Contrary to the practice observed in most educational development assistance programs today which focus on particular sectors of the education system, Cuba early on adopted a holistic and differentiated approach which took all components of education equally into account. The country carefully expanded its education system from the bottom up, targeting at first lower-level mass education, technical/vocational education, and later on higher education (Carnoy & Samoff, 1990; Eckstein, 1997). Over time, Cuba also moved from aiming at quantitative educational

goals during the early days following the Revolution (higher participation) to more qualitative goals (better-quality education and reduction of inefficiencies).

#### Primary, Secondary and Pre-University Education

The most important event at lower levels of schooling following the Revolution was the literacy campaign in 1961, the “Year of Education”, which aimed at the eradication of widespread illiteracy in rural areas of the country (Breidlid, 2007). Although the commonly cited figures regarding the eradication of illiteracy within a very short period of time are exaggerated (most people gained basic literacy skills, but were far from functionally literate after one year of night schooling), the campaign did serve to mobilize the whole population around the government’s educational goals. The expansion of the school system in the early days after the Revolution occurred on a massive scale: By the end of 1961, the Cuban leadership had built 671 new rural schools, 339 urban schools, and 99 basic secondary schools (Lutjens, 1996). Enrolment in primary schools rose from under 60% of school-aged children prior to the Revolution to over 96% by 1971/72 (Richmond, 1985). The literacy campaign also marked the beginning of urban youth moving to the countryside which became an important aspect of education from 1961 onwards (Carnoy & Samoff, 1990).

The Plan de Perfeccionamiento resulted in considerable changes to the school system: The structure and cycles of the school system were completely overhauled; curricula were revised and new textbooks, programs and teachers’ manuals, teaching methods and evaluation techniques introduced; the emphasis shifted to mathematics and the sciences; changes to in-service teacher training were initiated; and the work-study principle was further expanded (Richmond, 1985; Richmond, 1990b.). The Plan also laid

the foundations for the establishment of large numbers of basic secondary schools in the countryside (ESBECs) and the growth of scholarship programs at both the secondary and tertiary levels (Richmond, 1990b). Initially, the “schools **to** the countryside” allowed for urban youth to spend about seven weeks working in the agricultural sector (Carnoy & Samoff, 1990; Lutjens, 1996)). The schools to the countryside were supposed to not only break down barriers between rural and urban youth, but also to help cover some of the demand for agricultural labour (Carnoy & Samoff). The schools were later replaced with “schools **in** the countryside” where students worked and studied on a year-round basis, a model which seemed to be more effective and which has been described as “distinctive” (Lutjens, 1996, p. 81). However, the schools never achieved self-sufficiency and did not come close to financing themselves based on the students’ labour (Carnoy & Samoff).

#### Postsecondary Education

Cuban higher education is widely acknowledged to resemble that of industrialized nations with respect to indicators such as participation and expenditure (Paulston, 1991). At the end of 1960, the first comprehensive university reform plan was presented by the newly created Higher Council of Universities, followed by further reforms in 1962 and 1964 (Paulston). The 1962 reform eventually resulted in the elimination of university autonomy and nationalization of private institutions (Paulston) and established, among other things, a scholarship system for the provision of accommodation, food and other services to university students, as well as the foundation for the establishment of scientific and cultural exchanges with other countries (Martín Sabina, 2002; Universidad de la Habana, 1985). The reform furthermore introduced new evaluation procedures for teachers and students, established a research commission and the Commission of

University Extension, and designed a new structure for degree programs (Vecino Alegret, 1997).

Following the Plan de Perfeccionamiento, the postsecondary system also underwent significant changes. By 1967, graduation levels in engineering, agricultural science, and medicine had increased up to sevenfold, although the overall enrolment was only slightly higher than before the Revolution (Carnoy & Samoff, 1990). By the mid 1980s, about half the students at university were workers enrolled in preparation courses. According to Richmond (1985), “the policy of universalising the university involved not only the ‘intellectualisation of the workers’ but also the ‘proletarianisation of the students’ “ (p. 25). While workers now had access to universities to supplement their practical with theoretical knowledge, students had the opportunity and were expected to supplement their theoretical studies with practical applications, as well as with voluntary work that was mostly carried out in the agricultural sector, often during harvest time.

Starting from the mid-1970s, Cuba strengthened its external relations with socialist countries. During the same time period, postsecondary education underwent a major restructuring for academic programs to become even more aligned with the needs and demands of the economy at that particular point in Cuba’s socio-economic development (Martín Sabina, 2002). In 1975, a new Ministry of Higher Education was created, together with special postsecondary institutions that focused on technical programs for the education of professionals in industry and agricultural sectors (Paulston, 1991). Organized volunteer productive labour programs were instituted as part of higher education programs (Paulston), in addition to the work practice within production enterprises that became part of the regular university curriculum and one of the most

important aspects of the teaching and learning process (Carnoy & Samoff, 1990; Vecino Alegret, 1997). As of 1990, the role of science and technology for the social and economic development of the country was further emphasized, in particular in light of the economic difficulties of the Special Period brought about by the disintegration of the Soviet Union (Martín Sabina, 2002). Alongside the academic stream in secondary schools, pre-university institutions, and later on universities, students also had the option to take technical/vocational training at a special institution (Carnoy & Samoff).

The current higher education system is still based on the fundamental principles enshrined in the various reform processes: Marxist principles towards solving societal problems; a strategy aimed at breaking down the barriers between universities and society referred to as *universalization*; importance of linking practical and theoretical studies, with special emphasis on work-study programs; emphasis on technical and science disciplines over humanities and social sciences; and the preparation of high-quality experts in technical-scientific fields (Paulston, 1991). Paulston argued that the tight integration of higher education with the economy eased the way for most graduates into employment, in particular because all of Cuban industry and all organizations are in the public sector.

#### International Collaboration

From the early days following the Cuban Revolution, the Cuban leadership has seen its educational model as having relevance for other lower-income countries and consequently started educational assistance programming in the 1960s (Richmond, 1990a). To this day, Cuba maintains a very active program of international collaborations and civilian aid programs through sending teachers, trainers, and educational specialist

consultants to more than 27 developing countries to assist in drafting and implementing educational reforms, and helping to set up medical schools (Martín Sabina, 2002; Richmond, 1985; Richmond, 1990a; Vecino Alegret, 1997).

Cuba started to accept international students on full scholarships (free tuition, accommodation, meals, laundry services, health care, recreational activities) in the early 1960s (Universidad de la Habana, 1985). By 1984, 75% of the international students had taken programs in three main academic areas: technology, medical sciences, and agricultural sciences (Universidad de la Habana). The majority of the remaining 25% were enrolled in natural sciences and mathematics, economics, and social sciences/humanities (Universidad de la Habana). From 1961 to 2000, Cuba graduated approximately 16,500 international students at the university level (Martín Sabina, 2002). Cuba continued to welcome international students on scholarships during the economic crisis and Special Period of the 1990s (Vecino Alegret, 1997), in spite of drastic cuts to the education budget by the late 1990s (Breidlid, 2007).

In the early years of the new millennium, more than 11,000 international students studied at the postsecondary level in Cuba, of which roughly 80% came from other countries in Latin America, and 16% from African countries (Martín Sabina, 2002). During the last several years, the majority of international scholarship students have attended the Latin American School of Medicine or the International School of Physical Education and Sports, and Cuba has offered over 2,000 scholarships annually to students from over 80 countries starting in the late 1990s (Martín Sabina, 2002).

Prior to 1990, the majority of scholarship recipients were African students (Richmond, 1990a): Between 1961 and 2001, a total of 28,132 students from Sub-

Saharan Africa graduated at the middle postsecondary level (technical/vocational) and higher postsecondary level (university) from Cuban institutions, constituting 70% of all international graduates (Ministerio de Relaciones Exteriores de Cuba, n.d.) The percentage of students from Latin America studying in Cuba increased dramatically after the demise of the Soviet Union to the figures shown in the previous paragraph. Cuba's scholarships are provided according to the principle of need: They are supposed to primarily reach students from low-income backgrounds who might not have any educational opportunities in their home countries (Richmond, 1990a). The Cuban scholarship program is also unique in another aspect: Contrary to the practice in most industrialized countries where international students are permitted and actively encouraged to stay after graduation, international graduates from Cuban institutions cannot stay behind upon finishing their studies. Cuba trains enough people for its own economy not to have to rely on its international students for that purpose.

I will now provide an overview of West African and Ghanaian education systems in the context of the region's history. In the framework of my dissertation's topic, this history section may appear very detailed. I considered it important to include an extended discussion for a variety of reasons. Since the focus of my study is a modernist socialist educational model, I deemed it necessary to include references to precolonial education models that existed in the Sub-Saharan region, in particular in West African societies, to not give the impression that such models did not exist. Including references to the colonial era seems inevitable when writing about Ghana due to the profound impact that colonization had on this and other countries. A brief historical overview of the colonial era is also vital to understanding certain observations reported by study participants

during my research. Both the highly utilitarian precolonial education systems, and the legacy and rejection of colonialism with its deliberately non-egalitarian educational approach, play a role in understanding why a socialist educational model as practiced by Cuba and extended to other countries may have appeared attractive to postcolonial societies such as Ghana. Finally, the overview of the Rawlings government's years provides the necessary background information to illuminate some claims made by the study participants.

### **Precolonial West African Societies and Education Systems**

African indigenous education systems existed throughout the continent prior to contact with Europeans. Pre-contact West Africa was a complex system of distinct peoples and societies, organized in small independent states with their own political, religious and educational bodies. Fyfe (1965) stated in his description of the Windward Coast (the area now occupied by Guinea, Sierra Leone, and Liberia) that formal education had existed throughout that area long before Europeans opened the first schools on African soil. Further east and just south of the Sahara, the main Western Sudanese empires were Ghana, Mali, and Songhay, to the north of modern-day Ghana. These empires reached their peak at various points during the period from A.D. 500 – 1600 (Awe, 1965). By the 16th century, Songhay was the dominant empire in the region, and Islamic influences that had started penetrating to West Africa as early as during the 11th century had firmly taken hold in all spheres of life (Awe). Islam advanced to Western Sudan through two primary mechanisms: via the trans-Saharan trade routes, and through the activities of Muslim scholars and clerics (Boahen, Ajayi, & Tidy, 1986). The way

Islam took root was through the conversion of local rulers in Western Sudan, as well as through a militant holy war to advance and spread Islamization (Boahen, Ajayi, & Tidy).

The southern areas of present-day Ghana were occupied by various Akan peoples and their states, most prominent among which were the Asante and Fante, and Ga (Boahen, 1971). These states did not develop into powerful kingdoms prior to the arrival of the first Europeans because they did not trade directly, but through an intermediary, while at the same time being spatially very crowded (Boahen, 1971). The origins of the Akan are contested; however, a likely scenario is that they originated to the north of Ghana's forest belt between the Black Volta and Comoé rivers (Boahen, 1965). A variety of states emerged in the region starting in the 14th century; however, by 1750, the Fante and Asante had become the two leading Akan peoples (Boahen, 1965). Accounts of these peoples' education systems prior to the introduction of colonial education are generally not well documented. These groups only organized into formal states with political, economic and cultural structures at a time when colonial rule had already been established.

Adeyemi and Adeyinka (2003) described traditional African education as highly specialized: educational practices were utilitarian in that they equipped children to fulfill a wide range of occupations in society. In many societies, formal education practices and professional teachers were common, while informal education that relied on learning by initiation, observation, repetition, oral literature, and play was also widely practised. Traditional curricula were grounded in people's physical, social and spiritual environments where religion, ethics and morality occupied important positions that

helped people subordinate personal aspirations to a larger collective interest (Adeyemi & Adeyinka).

Davidson, Buah, and Ajayi (1967) confirmed that formal educational institutions in West Africa - as we know them today - existed mainly in Western Sudan up to the 16th century. Outside of these institutions, education occurred through popular instruction in everyday practices and customs, traditional law, and the preparation of priests, healers, and other specialists in various crafts, such as weavers and metal workers. Future community leaders were taught rites that included learning about the history of their people, as well as law enforcement issues. In societies with central institutions, the skills related to civil service administration were also part of the schooling agenda (Davidson, Buah, & Ajayi). These authors ascertained that most of the schooling in 16th-century West African civilization was through word of mouth. Another feature they stressed is the essentially static nature of the educational effort, marked by an absence of experimentation with new methods and techniques which are necessary for progress. The authors' argument appears somewhat contradictory since they continued to outline how the farmers, skilled workers and other specialists "had discovered and learnt a great deal about their work. All this discovery and learning came from many years of steady development" (p. 171).

C. K. Graham, in his 1971 book *The history of education in Ghana*, supported this view regarding the limitations of progress inherent in early West African civilizations. Graham provided the subtitle "From the earliest times to the declaration of independence"; yet, his historic account starts with the opening of a Portuguese school in Elmina in the early 16th century. In the preface to his book, Graham (1971) asserted that

traditional education was fully capable of supplying the necessary elements to maintain the levels attained by their society in the economic, social, technical and cultural areas. However, over the years traditional ... came to offer little possibility for progress in the assimilation and spread of new experiences and knowledge. (ix)

I consider this to be a problematic statement since we do not know how Ghanaian society and its education systems would have developed without the extended colonial contact. Although Adeyemi and Adeyinka (2003) corroborated the claim that precolonial education did not encourage innovation and enterprise because it served primarily the preservation of skills, customs and knowledge, these authors did not conclude that this situation would have prevented any further progress from occurring.

Assié-Lumumba (2000) added to the discussion about pre-contact education by stating that there was no gender imbalance regarding access to education in precolonial societies since girls and boys were equally expected to make contributions to their communities. Although girls and boys had distinct roles in society, these roles were equitable and did not lead to the type of stratification along gender lines that was introduced by the colonizers (Assié-Lumumba). Adeyemi and Adeyinka (2003) also stressed that precolonial education was gender-based with distinct masculine and feminine responsibilities. According to these authors, male children were trained to be farmers, tradespeople or rulers, whereas female children were educated to become wives and mothers. Although this division appears to resemble the Western gender-stratified society, it is unclear whether the role accorded to women lowered their status in society similar to the way homemaker women came to be perceived in the Western model. Most likely, this is not the case: Adeyemi and Adeyinka argued that male and females were

equally prepared to play their respective useful roles in the community, and that the raising of children was seen as an important function to link young people with their history, culture and values.

In spite of the widespread existence of indigenous education systems and practices in West Africa, prior to the arrival of European colonialism, few formal higher education institutions were found on the African continent. The main institutions were located in Egypt, Morocco, and Mali, and served a variety of Arab-speaking populations (Nkulu, 2005). Timbuktu on the northern edge of the Songhay empire had become the centre for scholarly Islamic learning by the 16th century (Awe, 1965). With the introduction of literacy through Islamic scholars in Western Sudan came the ability to preserve historic accounts in book form, as well as knowledge about sciences and technology (Boahen, Ajayi, & Tidy, 1986). However, because Arabic was not spoken widely in Africa, there was little integration between Islamic humanism and indigenous African cultural values that were passed on and taught through more informal education systems (Nkulu). Awe and Boahen, Ajayi, and Tidy affirmed that Islam was an urban religion and was confined to the large trading cities, while exerting little influence over the majority of the population, especially in rural areas. Thus, in spite of the efforts to apply higher education to the needs of society, Nkulu concluded that higher education largely followed the liberal educational model and stayed elitist, whereas informal and formal indigenous African education that was highly relevant to Africans resembled more closely the utilitarian model, where education was inseparable from other aspects of life, and where there was little distinction between theory and practice (Blaud, 2001; Rodney, 1982). The oldest formal centre of higher learning in Sub-Saharan Africa is Sankore University in

Mali, the former Songhay empire, also known as the University of Timbuktu or Tombouctou (Makgoba & Seepe, 2004; Nkulu). Literacy and book learning techniques were introduced by Muslim scholars at the university and penetrated cities and towns in West Africa; however, Islam did not have much influence outside of these centres (Davidson, Buah, & Ajayi, 1967).

### **European Arrival, Colonialism and Colonial Education Systems**

Between 1600 and 1800, major changes occurred in West Africa that were to fundamentally influence the future of the region. The empires of the Western Sudan came to an end which resulted in changes to the use of traditional trade routes (Davidson, Buah, & Ajayi, 1967). Trade with European sea merchants was on the rise, resulting in gains for some and losses for others. However, the Europeans also fought each other on African soil, and the battle between the Portuguese, the Dutch, the French and the English for strategic posts like the fort at Elmina in present-day Ghana bears witness to these conflicts. Depending on where their interests lay, the African inhabitants of the contested areas sided with different European groups at different times (Davidson, Buah, & Ajayi). Davidson, Buah, and Ajayi noted that the Africans, although much influenced by increasing European trade, long had the upper hand on land and even at times managed to seize control of European holdings such as the Danish fort of Christiansborg in Accra, while the Europeans were the masters of the seas due to their more advanced technical equipment. These authors claimed that the balance of power finally started to shift in favour of the Europeans late in the 18th century. At that point, the cross-Atlantic slave trade was already well underway to feed the European needs of the growing new economy, in particular in mining and sugar plantations, in the Americas.

The extent of the slave trade is difficult to grasp. Ward (1958) elaborated that It is estimated that between 1680 and 1700 the Royal African Company exported 140,000 slaves, and interlopers exported 160,000 more. Between 1700 and 1786, the island of Jamaica alone received 610,000 slaves from all sources. At the end of that period, the annual slave trade was estimated at 38,000 British, 20,000 French, 10,000 Portuguese, 4,000 Dutch and 2,000 Danish, 74,000 in all. There were 192 British ships employed in the slave trade in the year 1770. (p. 87)

Not only did the slave trade have a devastating effect on the enslaved and on families torn apart and communities which lost their young people, but it was also responsible for a large number of wars between nations of the interior of Africa that competed for meeting the white man's demands for prisoners (Ward).

Between 1650 and 1850, the southern region of present-day Ghana was characterized by rivalries between various peoples in which the powerful Asante, with their capital in Kumasi, eventually gained the upper hand (Davidson, Buah, & Ajayi, 1967). An act of union in about 1695 under one of the Asante's supreme leaders, Osei Tutu, united various smaller groups and thus created a powerful empire. After defeating their main rivals, the Denkyira, in 1700, the Asante started negotiating directly with the British at Elmina Castle with whom the Denkyira had originally held a rent agreement. The other main group challenging the Asante's supremacy were the Akwamu and subsequently the Akyem who defeated the Akwamu in 1730. However, only 12 years later the Asante decisively beat the Akyem and thus took control of much of present-day Ghana for more than the next hundred years (Davidson, Buah, & Ajayi; Gocking, 2005). Quarrels between the Asante and Fante, and between the Africans and the remaining

Europeans – the British and the Dutch - persisted along the south coast around trading partnerships between these groups. After various conflicts by the year 1820, peace had been established once again with the Asante on the African side, and the British on the European side, now the predominant powers (Davidson, Buah, & Ajayi).

Colonial rule and colonial economic relationships can be seen to have started with the slave trade. As Davidson, Buah, and Ajayi (1967) pointed out,

This exchange of raw material (as we may call human labour in this case) for manufactured goods was an early kind of *colonial exchange*. ... In other words, the slave trade opened the way for the colonial system that was to follow in the second half of the nineteenth century. (pp. 285-286)

Britain established formal colonial rule over the Gold Coast in 1874, although the extent of British jurisdiction was not entirely clear: Kimble (1963) elaborated that, in the absence of clear boundaries with regard to British authority, the main impact of British colonial rule was felt through the introduction of taxes through customs duties. Struggles over jurisdiction and the designation of areas as a colony or a protected territory were resolved in 1901 when the whole area under British control became a colony, bound by British anti-slavery laws that had been passed in the meantime (Kimble). Leaders of the Asante empire clashed on a number of occasions with the British, in spite of treaties reached between the parties. An attempt in 1900 by the Asante to assert their rights as a sovereign unit failed, and Ashanti<sup>1</sup> was annexed in 1901 (Kimble). Agreement over the Northern Territories of the Gold Coast was reached with the French and German colonizers, and these lands became part of the colony in 1901/02. In 1901, British

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<sup>1</sup> Following contemporary usage in Ghana, I have used *Ashanti* to signify the region occupied by the Asante, and have used *Asante* to describe the peoples themselves (R. Gocking, [2005], *The History of Ghana*).

influence thus comprised the British colony of the Gold Coast along the Southern coastline of modern-day Ghana; the British Colony of Ashanti, north of the Gold Coast, and roughly demarcated by the Volta River; as well as the British Protectorate of the Northern Territories (Gocking, 2005). The narrow stretch of land named Togoland, running all the way up to the east of the three other areas, was put under British control in 1919 after the end of the First World War (Gocking).

Over the next 50 years, the Gold Coast colony gradually acquired a constitutional and territorial identity, although the Asante and people of the Northern Territories continued to preserve their traditional organization as much as possible (Kimble, 1963). Kimble described how, eventually, a tenuous sense of national unity developed as British law and justice systems were widely applied, and Africans started to learn the English language.

Within 10 years after the end of the Second World War, the colonial system on the African continent began to crumble. In Ghana, the end of the colonial government was precipitated by the government's shortcomings and the formation of two political parties, the United Gold Coast Convention (UGCC) and the Convention People's Party (CPP). The pressure from within was aided by larger global developments, for example, Britain's promise to grant independence to India, Burma, and Ceylon, and the newly formed United Nations' charter that called for self-determination of all peoples (Gocking, 2005). Discontent in Ghana grew along a number of dimensions: the refusal of the British to establish a university in Ghana; rising unemployment; neglect of the agricultural sector and of agricultural education; the ruthless exploitation of minerals by expatriate mining companies; as well as constraints imposed on Ghanaian merchants (Boahen, 1975). The

leading figures of the independence movement were Kwame Nkrumah as general secretary of the UGCC who broke with this party and formed the CPP in 1949; as well as George Grant, chairman of the UGCC, and J. B. Danquah, vice-chairman (Gocking). A boycott of European goods and the resulting riots and looting in February 1948, followed by three years of attempts by the colonial government to silence the two parties, resulted in the 1951 constitution with enhanced Ghanaian participation in the legislative and executive councils (Boahen, 1975). The subsequent general election in February 1951 was won by the CPP under Kwame Nkrumah whose politics were characterized by progressive, pan-Africanist ideas which appealed particularly to the younger voters (Boahen, 1975). Nkrumah was imprisoned at the time, but had to be released to form the government. During the CPP's first term in office, it launched an ambitious five-year development plan and implemented major projects, among which: the construction of new roads linking the country's main arteries; the Adomi Bridge over the Volta River; rehabilitation of the cocoa industry; municipal housing projects; health services; water-supply facilities; free compulsory primary education and reorganization of the post-primary system; expansion of schools and postsecondary institutions, especially teacher training colleges; and initial steps towards the building of a dam on the Volta River to produce hydro-electric power (Boahen, 1975; Gocking).

As reported by Boahen (1975), the general election in 1954 resulted in a decisive second victory for the CPP, but independence did not come until 1957 due to delays related to questions about the status of British Togoland and to the rise of the National Liberation Movement (NLM) as an endeavour by the Asante to gain more influence in government. Another general election was called for July 1956 following intense

violence and demands by the NLM, and the CPP gained another decisive victory.

Following a motion by Nkrumah in August 1956 for independence, the British Parliament granted approval, and Ghana became independent on March 6, 1957.

During the colonial period, major changes occurred on the African continent in regard to education. As pointed out by Kimble (1963), the term education itself came to be associated with formal instruction in European-type schools in the Gold Coast. The African inhabitants of the Gold Coast soon understood that education offered material advantages in the colonial society; however, more Westernized education meant that they fit in less with the traditional order, a situation which caused a division between the educated elites and the traditional leaders (Kimble). Elementary schools were highly unevenly distributed between the regions, with a particular disadvantage for the Northern Territories (Kimble). The reason for this situation lay partly in the fact that schools were run by Christian missions which found it more difficult to penetrate the north where Islam had a stronger foothold and traditionalism was more pronounced.

Apart from a high school that opened at Cape Coast in 1876, secondary education institutions did not start to appear in the Gold Coast until the early 1900s. Kimble (1963) pointed to a contradiction in the colonial education system whereby the colonizers pushed for more education of Africans, but did not appreciate the educated for being in a position to challenge authority and to demand employment and advancement in the colonial administration. The British used various discriminatory practices, for example a stratified system of service appointments that reserved lower ranks and routine duties for Africans, as a deliberate practice to exclude qualified Africans from positions of responsibility (Kimble). Ongoing pressure by Africans due to their intense interest in secondary

education, and a report in 1920 by an Educationists' Committee, resulted in the expansion of the secondary system: Four junior trade schools were set up in different parts of the country in 1922, and the foundation for Achimota secondary school was laid in 1924, offering everything from kindergarten to university preliminary classes (Kimble). In spite of efforts to address the regional disparity in education services through the Northern Territories Education Ordinance of 1927, regional disparities had grown to such an extent over the years that the situation was no longer easily rectifiable (Kimble).

Concomitant with the expansion of the secondary school system in the Gold Coast, the modern tertiary education system in Africa also took root during the colonial period when the colonizers realized that education could be used deliberately to control social change, subjugate the local population for the benefit of the colonizers' development, and destroy traditional social and cultural values (Abdi, 2003; Blaud, 2001; Samoff & Carrol, 2003). The first Western-style institutions on the African continent appeared in the second half of the 19th century. Fourah Bay and Liberia College were the brainchild of Western philanthropic organizations that aimed at providing a Western education to former slaves who settled on the west coast of Africa (Nkulu, 2005). Another Western-style school was established in Khartoum, Sudan, in 1898, possibly to prevent the spread of Islam. As mentioned above, Achimota was the first institution in the Gold Coast offering postsecondary education at the most basic level.

Sub-Saharan tertiary education during the colonial period resulted in little indigenization; rather, the educational systems in the colonies were carbon copies of metropolitan universities with respect to curriculum, academic practices and teaching

staff (Nkulu, 2005; Samoff & Carrol, 2003). The educational policies in colonized Africa aimed at educating the population at the lowest level, marginally sufficient to serve in the colonial administration, and thereby failed completely to prepare the colonies for future self-government (Blaud, 2001; Rodney, 1982). Contemporary problems regarding the former colonies' educational systems and the shortage of graduates trained at higher levels can be seen as a direct and ongoing result of these colonial conditions. Assié-Lumumba (2000) asserted that the introduction of gender-segregation in regard to access to education in African societies can also be traced back to colonial rule: Rooted in their patriarchal societies, European colonizers introduced gender roles into African society and started training boys and girls for distinctly different purposes. The reorganization of African societies along European gender lines created imbalances in access to education for females that persist to the present day. As mentioned previously, this view has been challenged by Adeyemi and Adeyinka (2003) who ascertained that segregation along gender roles has always been a feature of traditional African education systems.

### **Post-Independence Ghana**

The economic situation of Ghana at independence was better than in many other African countries, and Ghana's per capita income equalled that of South Korea in 1957 (Herbst, 1993). During the 15 years in between internal self-government for the Gold Coast colony in 1951, and the overthrow of the Nkrumah government in 1966, Ghana followed a policy of constitutional restraint and social improvement characterized by "a strong respect for the advancement of a social struggle under a rule of law" (Davidson, 2005, p. 231). At the same time, however, Ghana's economic situation deteriorated from having one of the highest per capita incomes on the continent shortly after independence,

to ranking only 21st out of 44 African countries by 1982, a situation that Herbst (1993) attributed to continuous budgetary overspending and the resulting foreign exchange crisis.

Schindehutte (2005) argued that African decolonization created unstable societies due to problems carried over from the colonial period, including

Arbitrary nation-state borders which often dissected native nations; the lack of training for the local population during colonial rule, making it difficult to run a country; a disproportional economy that relied too heavily on cheap exports; and installed ethnic hatred. (p. 46)

To these, Thomson (2004, p. 22) added

- Weak links between state and society (resulting in a deficit of legitimacy and society disengaging from the state);
- Formation of a state elite (resulting in an exploitative “bureaucratic bourgeoisie”);
- Non-hegemonic states (resulting in an inability to project state power into the hinterlands).

Schindehutte continued to postulate that

Economic independence could not be attained through political independence. In this case economic trends and necessities created political policies. Britain could let Ghana go because it had been incorporated into the Empire, through cultural, political, and economic dependency. (p. 47)

One dimension in which the colonial situation had a lasting impact on post-independence Ghana was in regard to differences in living standards between Ghana’s now 10 administrative Regions, as signified and exacerbated by rapid urban growth and

economic gains in the southern Regions over the more impoverished northern parts of the country (Gocking, 2005). Although colonialism thus contributed significantly to the subsequent political and economic path that Ghana and other African countries took, domestic policy decisions ought to be examined as well in any discussion of why Ghana, after its promising beginnings as the vanguard of independence amongst African states, descended into “Third World” postcolonial dependency, which Davidson (2005) described as a “socio-political wasteland in which nothing advanced the people’s cause” (p. 232). In terms of foreign policy, the Nkrumah years were marked by the president’s passionate interest in African unity, increasing unease with the neo-colonial policies of Western countries, and a shift to the left and closer ties with the Eastern Bloc in the early 1960s (Gocking). Gocking concluded that

in spite of many challenges and failures, Nkrumah was “the towering figure of the independence era in Africa south of the Sahara. ... In a visionary fashion he confronted many of Africa’s fundamental problems that have yet to be solved. ... He left a stamp on Ghanaian history that continues long after his death. ... [His] violent removal from office also unfortunately brought Ghana into line with what was emerging as the dominant trend in much of the continent – the military intervention into politics. (pp. 141-142)

Following the overthrow of the Nkrumah government, Ghana moved through a series of coups, competitive elections, and nine transitory regimes under various political groupings between 1966 and the early 1980s, during the course of which the country’s economic position increasingly worsened and executive violence grew (Davidson, 2005). I will not go into details about any of these regimes here; suffice it to say that some of the

major issues with which these governments had to grapple were questions of whether to privatize state enterprises; fluctuating cocoa prices, one of Ghana's major export items; and foreign exchange shortages (Herbst, 1993).

Flight Lt. Jerry J. Rawlings first seized power in June 1979, but handed it to democratically elected president Limann three months later. Apparently dissatisfied with Limann's performance, Rawlings toppled Limann in a second coup on December 31, 1981 (Herbst, 1993), a political move Rawlings referred to as "nothing less than a revolution" in his first radio broadcast to the nation (Accra: Information Services Department, as cited in Herbst). Under the newly established Provisional National Defense Council (PNDC) – the civilians and army officer who ruled with Rawlings - Ghana started an economic program whose main characteristics Herbst described as follows:

... a state monopoly on export-import trade, eliminating corruption in the allocation of import licenses, and trying to reorient trade away from the West. ... Workers' Defence Committees (WDC) and People's Defence Committees were established to mobilize the population, ... While helping urban workers, the Rawlings regime seemed to accentuate the urban bias of previous regimes by imposing controls on the sale and price of food, ... The government also tried to coerce traders, sometimes through blatant physical force, into making goods available at controlled prices. (p. 28)

According to Herbst, these reforms far exceeded traditional economic interventions such as changes in relative prices and went to the roots of the country's economic and political institutions. Herbst explained that the policies adopted by the Rawlings government have

to be assessed in the context of the relationship between political liberalization and economic reform – a relationship that was critical for the newly independent African states.

Herbst (1993) noted that Rawlings inherited a state that had “interfered with its economy to an extent perhaps unequalled even in Africa” (p. 14). A National Economic Review Committee (NERC) was supposed to help answer pressing economic questions. The NERC concluded that external financial support was necessary, if need be through the IMF, although the IMF would undoubtedly impose policy reforms and conditions. This view clashed with the early anti-imperialistic and pro-poor character of the government’s rhetoric which made the IMF a rather objectionable option (Nugent, 1996). Rawlings investigated financial assistance options through the Soviet Union and Eastern Bloc countries, but did not receive any help from them (Herbst; Nugent). The Economic Recovery Programme (ERP) presented by the government as part of the April 1983 budget announcement stayed clear of any reference to state control over vital economic sectors, likely because of pressure from the IMF and World Bank (Nugent). The early revolutionary rhetoric around dependency theory and economic nationalism was soon replaced with the discourse of neo-classical economic liberalism dictated by the international donor community (Nugent). The Rawlings regime’s adoption of the ERP coincided with the availability of substantial new resources by the World Bank and the IMF for economic development in Sub-Saharan Africa, and Ghana was able to secure large commitments at the expense of paying the political price of accepting the lenders’ conditionalities (Herbst). Much of the government’s politics in subsequent years were characterized by a two-pronged policy: “On one hand, the PNDC was trying to maintain

its revolutionary credentials with left-wing factions in Ghana and the East-bloc countries while at the same time accepting IMF and World Bank advice and loans” (Gocking, 2005, p. 206).

Economic liberalization did not have broad support in the population, and concealing significant policy changes behind the appearance of continuity became one of the marks of the Rawlings regime (Nugent, 1996). The reforms worked to the disadvantage of the urban population: While the Workers’ Defence Committees of 1982 had constituted a challenge to organized union structures, the WDCs lost their influence as a result of the ERP (Herbst, 1993). In examining the reforms’ impact on the rural population which had been disempowered as a result of both colonial and early postcolonial policies, Herbst asserted that agriculture was one of the ERP’s central pillars since 1983. However, in spite of measures aimed to strengthen the agricultural sector, such as increasing the nominal price of cocoa through devaluation, the rural population was still absolutely poorer in the late 1980s than they were in the mid-1970s (Herbst). On the political level, Herbst concluded that the government had failed to cultivate a rural constituency, and that peasants were not included in the policy-making process to any substantial extent.

The first ERP was followed by a structural adjustment program (SAP or ERP II) that aimed to further shrink the public sector (Nugent, 1996). Herbst (1993) observed that IMF conditionality became a contentious issue in Ghana because the fund continued imposing strict prescriptions regarding the budget deficit, money supply, and exchange rate after it became clear that the Rawlings government was serious about reforms. Herbst, as a proponent of structural adjustment, highlighted the positive impact of the

ERP on the Ghanaian economy and argued that African countries (including Ghana) do not necessarily face problems because of conditionalities imposed on them, but because of flawed government policies. However, structural adjustment also had implications for the social sectors: Hospital service fees and drug charges were introduced, and feeding and housing subsidies for secondary school and university students removed; thus, certain aspects of the SAP proved to be particularly disastrous for the least privileged segments of society (Nugent). Herbst's largely positive assessment of structural adjustment in Ghana does not appear to have been borne out by developments into the 1990s. Bentsi-Enchill (1998) claimed that, at the end of 1997, "most Ghanaians are in for harder times as the government struggles with a tough structural adjustment programme that its main creditors insist should be tightened up further" (¶ 2). According to Bentsi-Enchill, Ghana had made progress in the 1980s and 1990s with regard to some macroeconomic indicators; however, progress had come at the expense of public spending on agriculture, education and health. This author saw the effect to be particularly severe in the agricultural sector which was still at the core of Ghana's economy, but which operated far below potential. Bentsi-Enchill attributed the underperformance of this sector to the ERP- and SAP-imposed reliance on market forces for resource use and allocation.

While implementing structural adjustment measures in the 1980s, the government also introduced sweeping reforms in the education sector which aimed at providing Ghanaians with more practical skills, reducing the time students spent in school (up until that point, students entered university after 17 years of formal schooling), and thus increasing the number of students who would access higher education (Nugent, 1996). The greater emphasis on practical skills resulted in plans for expanding technical colleges

and specialized universities at the same time as access to higher education for the poorer strata was potentially going to be curtailed through the imposition of fees and removal of subsidies (Nugent).

Rawlings's economic reforms were accompanied by gradual political changes. Ten years after Rawlings's coup, a draft constitution for a republic and return to a multi-party democracy was ratified in a national referendum (Nugent, 1996; Wikipedia, 2007, December 28). Presidential elections in November 1992 followed by parliamentary elections in December resulted in Rawlings's inauguration as president under the auspices of his newly formed party, the National Democratic Congress (NDC), to power (Nugent; Wikipedia). Rawlings was re-elected in 1996 with 57% of the popular vote and was succeeded in 2001 by John Kufuor of the opposition New Patriotic Party.

Ghana's post-independence political and economic trajectory followed a pattern observed in several African nations. Thomson (2004) explained that capitalism and liberal democracy that had taken a hold in the West by the 1960s were seen as inappropriate by most African postcolonial societies. Many countries thus adopted a form of socialism that Thomson characterized as "African socialism" – modeled on, but not identical with, the scientific socialism practiced by the Soviet Union. This was the model embraced by Kwame Nkrumah, whereas president Rawlings shifted to a model of trying to bring the populace at large into the governmental process through institutions such as the Peoples' Defence Committees (Thomson). According to Thomson, neither of these models escaped the formation of a "bourgeoisie of the public service", the conferral of privilege to all those commanding control over state institutions vested in this group through their historic ties with the colonial administration. As I have outlined in chapter

4, this situation appears to have had consequences for the reintegration of graduates from the Isle of Youth program.

I will now provide some details on the educational situation in Ghana at the time when the collaborative development program with Cuba was negotiated shortly after Rawlings took power in 1981.

The June/July 1982 Conference of Ministers of Education and those Responsible for Economic Planning in African Member States (MINEDAF-V) in Harare, Zimbabwe, was the fifth regional conference aimed at questions of policy making and co-operation in the area of education on the African continent (Cisse, 1986). The conference participants from a large number of African UNESCO member states stressed the importance of democratization of education and aligning educational efforts with each nation's economic and socio-cultural development programs (Cisse). The participants further emphasized the need to break with colonial systems and design curricula that were reflective of their indigenous societal needs. In his opening address, the Director-General of UNESCO, Mr. Amadou-Mahtar M'Bow, acknowledged the need to align education in Africa with the predominantly agricultural structure of most African nations (cited in Cisse, p. 8):

We must recognize the fact that in most cases schools have not yet been geared to contributing substantially to the development of agriculture, which remains the essential sector in the life of most African countries... Young people with schooling must become the pioneers of that agrarian revolution awaited by most African countries, one which should bring profound changes in both the conditions of agricultural productivity and the living conditions of rural populations.

Unfortunately, government policies during the 1980s were also not conducive to development of the agricultural sector. Although that sector constituted about half of GDP between 1980 and 1991, the budgetary allocation it received fell from 10.4% in 1983 to about 4% annually from 1986 to 1990 (Anarfi, Kwankye, Ababio, & Tiemoko, 2003).

Cisse went on to outline that

The same situation obtains in the technical and vocational sector, in which training is still particularly poor. The old imbalance in favour of general education to the detriment of technical and vocational education is still with us. Whereas between 1970 and 1978 total numbers in general education increased by 84 to 85 per cent, numbers in technical and vocational training fell by 10 to 12 per cent over the same period. ... Hence it is urgent for Africa to train scientists, engineers and technicians by giving science teaching the priority that stems from the paramount need to develop the continent. ... The social aims of education call for a closer link between schooling and the world of work, so as to inculcate in pupils at all levels the idea of team work and a respect for manual work (which needs upgrading in relation to intellectual work). In this connection the Harare Conference emphatically restated the importance of productive work in education. (p. 8)

The final Harare Declaration called, among others, for the following actions to facilitate the development of contextually appropriate education models across Africa:

- Promote the education of girls and women to achieve quality in education, in particular at the secondary and postsecondary levels, and in science and technology education.

- Introduce productive work into the educational system; enhance links between the education system and the production sector.
- Enhance technical, vocational and agricultural education; promote the modernization and increase productivity of agriculture; improve living conditions in rural areas (Cisse, 1986).

The following table provides an overview of some vital educational statistics for Ghana between the attainment of independence in 1957 and the Harare Conference.

**Table 1 Selected educational indicators for Ghana 1960 to 1980**

| <i>Type of Indicator</i>   | <i>Year 1960</i> | <i>Year 1970</i> | <i>Year 1980</i> |
|--|------------------|------------------|------------------|
| <b>Gross enrolment ratios by level of education and sex (in %)</b> |                  |                  |                  |
| <b>1st Level (6-11 years)</b>                                      |                  |                  |                  |
| <b>Male and female</b>   | 46.2             | 67.3             | 73.1             |
| <b>Male</b>  | 60.5             | 75.1             | 81.7             |
| <b>Female</b>  | 32.1             | 59.6             | 64.5             |
| <b>2nd Level (12-18 years)</b>                                     |                  |                  |                  |
| <b>Male and female</b>   | 18.8             | 41.8             | 35.7             |
| <b>Male</b>  | 27.7             | 52.4             | 44.0             |
| <b>Female</b>  | 10.1             | 31.3             | 27.4             |
| <b>3rd Level (19-23 years)</b>                                     |                  |                  |                  |
| <b>Male and female</b>   | 0.2              | 0.7              | 1.0              |
| <b>Male</b>  | 0.4              | 1.3              | 1.7              |
| <b>Female</b>  | 0.1              | 0.2              | 0.3              |

|   |      |      |
|---|------|------|
| <b>Illiteracy by sex for the age group</b>  |      |      |
| <b>15 years and over (in %)</b>             |      |      |
| <b>Male and female</b>                      |      | 69.8 |
| <b>Male</b>                                 |      | 56.9 |
| <b>Female</b>                               |      | 81.6 |
| <b>Estimates of illiteracy rates by sex</b> |      |      |
| <b>(in %)</b>                               |      |      |
| <b>Male and female</b>                      |      | ---  |
| <b>Male</b>                                 |      | 46.3 |
| <b>Female</b>                               |      | 63.8 |
| <b>Proportion of population by levels</b>   |      |      |
| <b>of educational attainment (age 25+)</b>  |      |      |
| <b>Less than secondary</b>                  | 98.3 |      |
| <b>Secondary</b>                            | 1.1  |      |
| <b>More than secondary</b>                  | 0.7  |      |

*Note.* Dashes indicate that no data were provided.

Adapted from data presented in "Education in Africa in light of the Harare Conference," by S. Y. Cisse, 1986, UNESCO, pp. 22-35.

This table very clearly illustrates the relatively low levels of educational attainment and attrition rates after the first level on the eve of the signing of the agreement between Ghana and Cuba for the Isle of Youth program. Under this program, Cuba offered educational scholarships to Ghanaian students at the secondary level in schools specially built for that purpose on the Isle of Youth south of the main Cuban island. Students then had the opportunity to pursue postsecondary studies either in universities or vocational training institutions. Although continuous achievements had been made in Ghana at the primary enrolment level throughout the years 1960 to 1980, the picture at secondary and postsecondary levels was different. At the postsecondary level, enrolment gains were small, especially for women, whereas at the secondary level, enrolment levels actually decreased between 1970 and 1980 after considerable gains had been made between 1960 and 1970. At the primary level, although increases continued throughout the 1970s, a slowdown in enrolment gains is also noticeable over the earlier decade. The 1970s were an era characterized by political instability and a rapid succession of governments in Ghana which may explain why little attention was paid to the further development of the education sector. Indeed, Assensoh (1982) pointed out that educational standards progressed under Kwame Nkrumah's Convention People's Party, but were subsequently undermined by the post-Nkrumah military and civilian regimes through neglect and poor salaries with the result that many Ghanaian teachers left for positions in neighbouring countries.

The figures also reveal a high incidence of attrition between the first and second level in the year 1980, just before the beginning of the Isle of Youth program. About three quarters of all school-aged children were in school during the first level, with male

enrolments exceeding 80%, and female enrolments slightly below 65%. Between the first and second level, about half of all children enrolled dropped out of the system. Overall, just over one third of the respective school-aged population was still in school at the second level, with the discrepancy between males and females now even more pronounced. It is against this background that the utilization by the Ghanaian government of the Isle of Youth program and subsequent postsecondary scholarships has to be understood.

### **Genesis of the Isle of Youth Program**

The combination of academic study and productive work has always been one of the most important principles underlying the Cuban education model, exemplifying the unity of manual and intellectual labour, community education, and the need for education to make a direct contribution to society (Richmond, 1990a). The principle manifests itself at various levels of the education system: school gardens in primary schools; field work at schools in the countryside; practical, discipline-related work placements and volunteer work in the agricultural sector at the universities (Richmond, 1990a). It is estimated that by the mid-1980s, 30% of Cuban students in basic secondary schools, and up to 66% of students at the preuniversity level, were enrolled in such rural schools (Eckstein, 1997).

Boarding schools in the countryside were established throughout Cuba in the 1970s, but the former Isle of Pines south of the main island of Cuba became a special case in that it hosted a cluster of institutions starting with its official designation as Isle of Youth by proclamation in August 1978 (Eckstein, 1997; Gonzalez Suarez, 2007). In fact, the first elementary boarding school had opened on the Isle of Youth in 1961 for local Cuban students, and in 1968, the first junior secondary and technical schools were established.

As of 1971, this initial phase was followed by the construction of larger numbers of junior- and senior-secondary boarding schools, and technical institutes (McManus, 2000). Schools were built around the citrus groves and were filled with students from different parts of Cuba and from more than 36 other countries (Gonzalez Suarez). By the mid-1980s, the Isle housed 45 junior secondary schools and eight senior secondary schools, a number of technical institutes and a teachers' training college (McManus).

The official Isle of Youth educational assistance program for international students traces its origins to the arrival of 600 Namibian students in 1978 who were survivors of the Cassinga massacre on May 4, 1978, during which the South African Apartheid regime bombed a Namibian refugee camp in southern Angola (Gleijeses, n.d.; Gonzales, 2000). Gleijeses, professor of American foreign policy at Johns Hopkins University, asserts that "no other country in the world opened its doors so widely and so generously to the Namibian refugees" (¶ 5). The Namibians were preceded by groups of students from Angola and Mozambique that had started arriving on the Isle in 1977 (McManus, 2000). Initially, a dozen African countries, depending on the number of students covered by the country's bilateral agreement with Cuba, were given one or several secondary schools (junior and senior secondary schools), as well as technical/vocational and teacher training colleges (Gonzales). At the secondary level, students typically shared the school only with their own nationals, whereas nationalities were mixed at higher levels. It is estimated that some 34,000 students graduated from this program between 1977 and 1996 (McManus).

The Granma Weekly Review of 22 January 1989 (p. 7) reported that the number of international students hosted by Cuba on a per-capita basis exceeded that of any other

country in the world (as cited in Eckstein, 1997). Although data on international students tend to be fraught with difficulties due to differences in reporting systems, it is quite feasible that the statement in Granma is accurate. Because the vast majority of these students attended Cuban institutions on full scholarships, it is certainly true that Cuba by far exceeded any other country with respect to hosting fully subsidized international students.

Based on their policy of nonalignment – which, it can be argued, would be more accurately described as a policy of multiple alignments -, Ghanaian president Rawlings and his PNDC developed close relationships in the early 1980s not only with the international bilateral and multilateral funding community, but also with a number of socialist regimes including Cuba. The PNDC established a State Commission for Economic Cooperation for the purpose of collaborating with socialist countries, in the wake of which several economic, trade and cultural agreements with Cuba and other nations were signed. Cuba, for example, trained Ghana's military staff, provided medical and security personnel for Ghana's political leaders, sent medical brigades to work in some of the poorest areas of Ghana, and taught Ghanaian athletes (Ghana country studies. Other countries, n.d.). When Cuban president Castro extended an offer to Ghana for educational scholarships at the secondary and postsecondary levels, Rawlings accepted because such training fitted well with the PNDC's educational restructuring policy whereby purely academic curricula were to be replaced with more vocational and technical training programs (Ghana country studies. Other countries). Ghana was assigned one basic secondary school in the countryside (Escuela Secundaria Básica en el

Campo or ESBEC). All schools were numbered, and the Ghanaian school came to be known as ESBEC #22.

Entering into an educational arrangement with Cuba that had a clear rural component and attempted to link academic studies with the world of work seemed timely for a number of reasons. In 1983, Ghana was in the middle of a severe countrywide food crisis (Dadson, 1983a & 1983b). When the PNDC came to power, it had hastily introduced a ban on food imports to promote self-sufficiency in food; however, the government failed to introduce adequate measures to ensure such self-sufficiency (Dadson, 1983b). Although labour was in relative abundance to carry out the necessary agricultural work, many youth seemed to have lost interest in the agricultural sector due to the discrepancy between rural and urban living conditions (Dadson, 1983b). The agricultural reforms introduced by the PNDC focused on capital-intensive farming methods and thus represented a radical break with more traditional forms of farming, rather than a smooth and gradual transition (Dadson, 1983a).

The Cuban offer came at a time when students from Ghana and other African countries found it increasingly difficult to study at universities in the United States of America, the United Kingdom or other European countries that had started introducing higher overseas student fees. As part of their neoliberal fiscal policy pursuits, these countries aimed to introduce full cost recovery models for international students, and many Ghanaian and other African students had to abandon their studies midway due to the prohibitive tuition fees (Perry, 1983).

Ghanaian students who participated in the Isle of Youth program were generally 12 to 13 years old and would typically start with six months of intensive general language

preparation in Spanish, after which they were taught some basic subject material in Spanish in core disciplines for the next six months. During the first year of the program's operation in 1983, students of varying ages participated because the school had to fill its places for all grades from 7-9, as well as the allotted places at higher schooling levels. After that initial year of language preparation, the students moved into grade 7 for three years of schooling at the junior secondary level. Because the program was structured around the work and study principle, students either went to school in the morning and worked for a few hours in the grapefruit orchards in the afternoon, or vice versa. The morning and afternoon shifts alternated every few weeks.

The available educational tracks after the three years of basic secondary school for Ghanaian students followed the same procedure as for Cubans, described by Lutjens (1996):

The Cuban system offered two options after basic secondary (grades seven through nine); students could pursue the preuniversity track for grades ten through twelve or enrol in technical and vocational studies, choosing between a two-year program for skilled workers in a polytechnical school or a three-to-four-year course for mid-level technicians in a polytechnical institute. By 1983 there were nearly three hundred schools of both types [in Cuba]. (p. 101)

The selection of Ghanaian students for postsecondary studies also followed the regular Cuban procedures. Standardized exams and other academic records were taken into consideration, alongside behavioural and attitudinal indicators, and became part of a ranking system, the *order of merit*, which was then reconciled with available places (Lutjens). As was the case for Cuban students, the Ghanaians' preferences did not always

match the available specialties previously negotiated between the Ghanaian and Cuban governments.

The ratio of placements in preuniversity to vocational/technical secondary schools (40:60) for Ghanaian students corresponded roughly to the ratio applied to Cubans.

Lutjens (1996) reported that by mid-1990, the “goal of reversing the share of enrolments in preuniversity and vocational/technical secondary schools had been achieved; less than 40 percent of enrolments were in preuniversity institutes, compared with the previous 60 percent” (p. 166). It is unclear whether the congruence of Ghanaian and Cuban ratios is a coincidence or was intended.

The Isle of Youth program did not come to an abrupt end and students were not returned home after the disintegration of the Soviet Union and the start of the Special Period in Cuba (Gonzales, 2000). The last intake of Ghanaian students occurred during the year 1989; however, the program on the Isle of Youth was not completed until all students had left the secondary and vocational training schools by the year 1996, at which point ESBEC #22 was closed down.

The combination of work and study in rural boarding schools generated a lot of discussion in Cuba, especially during the Special Period of the 1990s. Parents were concerned about the remoteness of schools and lack of parents’ ability to visit in light of the transportation situation, the effects of separation on families, and the conditions under which students lived and worked in those locations (Lutjens, 1996). Others have hailed the schools in the countryside as a highly innovative approach towards integrating the world of education with the world of work (Gajardo, 1988), and one which particularly benefits students from remote rural areas of the country (García, 1986). The Ghanaian

students' experiences with and opinions about the program were just as varied and are discussed in detail in chapter 4.

### **Significance of the Study**

Apart from the study undertaken by Hickling-Hudson (2000a) on the impact of the Cuban scholarship program at the tertiary level on graduates from certain Caribbean nations, no further empirical research appears to have been carried out on the Cuban scholarship model and its meanings for participating students. This study will therefore lend empirical evidence to the various claims that have been made by scholars, education practitioners, development specialists, and politicians, and on the basis of which the Cuban scholarship program has been hailed as a bright beacon of a truly internationalist educational development model, or condemned as a vehicle of socialist propaganda. Also, while the limitations of this single study will not allow for broad conclusions that can lead to policy changes and ultimately an empowerment – in tangible terms - of the people at the heart of the study, this will become the first published empirical research study that gives voice to a group of participants in the Isle of Youth program. I anticipate that this study will elicit constructive comments and reactions and will lead to further research which will eventually accord the Isle of Youth program its due place in educational history. Once such follow-up research is available, it is my hope that present-day policy makers will take note and draw conclusions from the experiences with the program that will translate into policy changes. Ideally, such changes will benefit future generations of Ghanaian children and young adults aspiring to gain an education which will not only satisfy their own intellectual ambitions, but will also allow them to make meaningful contributions to society.

The study is very timely in light of the demographic developments in the industrialized parts of the world. In a large-scale survey carried out by Manpower Inc. (2007) amongst 37,000 employers in 27 industrialized countries and emerging economies, the company found that 41% of all employers reported difficulties filling positions, most of which were in the highly-skilled and semi-skilled categories.

Canada, just like most other highly industrialized countries included in the Manpower study, is currently experiencing the impact of two developments: (1) a large, aging baby boomer generation resulting in an overall rapidly aging population, and (2) a birth rate which falls well below replacement levels (CBIE, 2007; Pereira, Shinewald, Wise, Yates, & Young, 2007). The combination of these two effects is resulting in an emerging shortage of skilled labour which many agree can only be mitigated through attracting new immigrants. Students are seen as a readily available pool of potential new immigrants who are already well adapted to the host country's environment (CBIE, 2007). The CBIE even recommends that

international students should commit themselves to preparing for transition to the Canadian labour market beginning early in their programs of study. To that end, post-secondary institutions should ... require a course ... be completed prior to graduation that prepare(s) international students for the transition from school to employment. (p. 28)

The Canadian government likes to portray Canada to the world as a nation espousing the values of openness, tolerance, and multiculturalism. The current discussion about labour market shortages shows, however, that Canada's multicultural image is not necessarily entirely driven by such value considerations. What is often overlooked is the fact that

there are some very real vested economic interests behind this image which is meant to attract much needed skilled labour from abroad to Canada.

CBIE (2007) has consequently recommended brain circulation as one strategic policy approach to addressing the labour market problem. While scant acknowledgement is made by the CBIE to the fact that problems with attracting more students to Canada might be due to increasing educational capacity in the students' home countries, this is presented as a trend to be countered rather than celebrated.

This study is therefore significant in that it may provide some answers as to whether the Cuban model which focuses on preparation of graduates for service in their home countries may have fostered the necessary mindsets amongst the graduates who participated in this study to withstand the powerful pull factors currently in operation throughout the industrialized world, and which are expected to continue for some time into the future.

As the number of countries organized around a socialist economic and political model has shrunk rapidly and capitalism has gained the upper hand, initiatives such as the Cuban Isle of Youth program can easily be dismissed as utopian socialist experiments without contemporary relevance. This study will attempt to illustrate what lessons might be drawn from the participants' experiences with and perceptions about the program, and whether the program has value and applicability to inform present-day challenges posed by scholarship programs and study abroad sojourns.

Lastly, the study raises some pointed questions about crafting a new discourse in development that is built around the self-identified needs, desires and limitations of people in recipient countries rather than the needs of the donor nations.

## **Definition of Concepts and Terms**

Many of the terms and concepts I have chosen to more closely elucidate below describe different areas of the globe and clusters of countries most commonly referred to as either developed or developing. It will become apparent from the discussion below that I take issue with the concept of segmenting the world into these binaries around which the development discourse is built. I have therefore alternated between different designations in my use of terminology throughout the dissertation. I urge that this may not be seen as a sign of inconsistency, but rather as a deliberate act of resistance to the inadequate labelling and the stereotypes and misconceptions that such labels bestow on their carriers. By alternating between these labels, I have attempted to continuously demonstrate my unease with either of the labels. The following discussion illustrates the controversy inherent in the use of labels and demonstrates why it may be more appropriate to alternate terms, given that some terminology is necessary to discuss the issues which are core to this dissertation.

### Development and Underdevelopment

Todaro (1989) defined underdevelopment as an economic situation in which there are persistent low levels of living in conjunction with the following characteristics: absolute poverty, low per capita incomes, low rates of economic growth, low consumption levels, poor health services, high death rates, high birth rates, vulnerability to and dependence on foreign economies, and limited freedom to choose between variables that satisfy human wants. (p. 652)

Development, on the other hand, is described as

The process of improving the quality of all human lives. Three equally important aspects of development are: (1) raising people's living levels, i.e., their incomes and consumption levels of food, medical services, education, etc., through "relevant" economic growth processes; (2) creating conditions conducive to the growth of people's self-esteem through the establishment of social, political and economic systems and institutions which promote human dignity and respect; and (3) increasing people's freedom to choose by enlarging the range of their choice variables, e.g., increasing varieties of consumer goods and services. (Todaro, p. 620)

I learned in various undergraduate university courses and during my subsequent professional practice that the term "underdevelopment" – a language found in many scholarly texts on development topics written by economists such as Todaro - is seen as politically incorrect in academic circles and must not be used to describe the lower-income regions of the world. Through my scholarly practice and inquiry, I have come to the conclusion that this is a well-meant, but actually counter-productive sentiment. When I attended my first conference in Cuba with large participation from lower-income countries, I was surprised that many delegates referred to their countries as "países subdesarrollados" (= underdeveloped countries). Rather than protecting people in those regions of the world from the stigma that many of us in North America and Europe think the word "underdevelopment" confers, the avoidance of this term is euphemistic and negates the fact that today's split between poor and rich nations is the result of a very deliberate and directed act of underdeveloping certain parts of the world for the benefit of others. Rodney (1982) made this argument powerfully:

In some quarters, it has often been thought wise to substitute the term “developing” for “underdeveloped”. One of the reasons for so doing is to avoid any unpleasantness which may be attached to the second term, ... on the economic level, it is best to remain with the word “underdeveloped” rather than “developing,” because the latter creates the impression that all the countries of Africa, Asia and Latin America are escaping from a state of economic backwardness relative to the industrial nations of the world, and that they are emancipating themselves from the relationship of exploitation. This is certainly not true, and many underdeveloped countries in Africa and elsewhere are becoming more underdeveloped in comparison with the world’s great powers, because their exploitation by the metropolises is being intensified in new ways. (p. 14)

Although these lines first written by Rodney in 1972 have to be seen in their proper historical context, the data presented at the very beginning of this dissertation suggest that Rodney’s expositions are just as pertinent today as they were at the time of his writing.

#### Developing countries and developed countries

Todaro does not provide a specific explanation in his glossary for these two terms. However, it follows from his definition of the term development that developing countries are those countries on the road to achieving developed status through the process of development, whereas developed countries are those that have already reached this status. Apart from Rodney’s problematization of this terminology presented above, a further challenge to using these terms lies in the need for defining threshold criteria.

The UNDP (n.d. a) conceded that

The concept of human development is much broader than what can be captured in the HDI [Human Development Index], or any other of the composite indices in this Report (see gender-related development index, gender empowerment measure, and human poverty index). The HDI, for example, does not reflect political participation or gender inequalities. The HDI and the other composite indices can only offer a broad proxy on some of the key issues of human development, gender disparity, and human poverty. A fuller picture of a country's level of human development requires analysis of other human development indicators and information. (p. 3)

In addition to the inadequacy of the HDI's composite indices, the boundaries between high human development and medium human development, as well as between medium human development and low human development, are arbitrarily drawn. Depending on the indices used, different countries receive different labels. The World Development Report issued annually by the World Bank, for example, draws much more heavily on economic indicators than the UN reporting system. In its World Development Report 2008 (World Bank, 2007) the World Bank uses the following classification scheme based on gross national income (GNI) per capita:

Low-income countries for GNI per capita of \$905 or less in 2005

Lower-middle income countries for GNI per capita of \$ 906 to \$3,595 in 2005

Upper-middle income countries for GNI per capita of \$3,596 to \$11,115 in 2005

High-income countries for GNI per capita of \$11,116 and more in 2005.

According to this scheme, Cuba is a lower-middle income country, whereas it actually ranked in the high human development category according to the UN scheme. Similarly, Ghana was classified as a low-income country by the World Bank, whereas it

received a medium human development ranking by the UN. The same pattern applies to Mongolia which is in the medium human development group with the UN, ranking 24 positions higher than Ghana, but is also classified as a low-income country by the World Bank. Although there is a positive correlation between the two classification schemes, the World Bank scheme most noticeably downgrades countries with lower income levels, but a more equal income distribution. On the other hand, the World Bank rankings privilege countries with high GNIs, but unequal distributions of income. Saudi Arabia, for example, is in the World Bank's high-income category, but is classified as medium human development by the UN, 25 ranking positions below Cuba.

#### Development assistance

Development assistance used to be referred to as “foreign aid”, a term which Todaro (1989) defined as

the international transfer of public funds in the form of loans or grants either directly from one government to another (bilateral assistance) or indirectly through the vehicle of a multilateral assistance agency like the IBRD (World Bank). (p. 627)

Often also referred to as official development assistance (ODA), the UNDP (n.d. b) described this concept as “Grants or loans to countries or territories that are undertaken by the official sector, with promotion of economic development and welfare as the main objective, at concessional financial terms” (Official development assistance, ¶ 1).

Although technically correct, these definitions mask two of the major problems associated with development assistance: debt servicing and conditionalities. Debt servicing refers to the combined interest payments and principal repayments on development assistance provided in the form of loans (Todaro). Although such loans are

given at somewhat lower than current (hence “concessional”) rates, levels of indebtedness and repayment commitments in many recipient countries nevertheless severely curtail public spending in sectors like education and health. As evident in Table 8 (p. 320), Ghana’s debt servicing in 2003 was about twice the figure for education spending, and 2.7 times the figure for health spending.

If development assistance is not channelled into sectors where it would yield the highest returns, the recipient country is often not able to generate additional income with the help of the development funds and will therefore have to use some of the public budget set aside for other purposes to service the debt. The agricultural sector in Ghana is a case in point: 53% of Ghana’s population lived in rural areas during the years 2003-2005, and the value added of the agricultural sector as a percentage of gross domestic product (GDP) for that period was 37.3% (World Bank, 2007). Yet, only 3.3% of the total amount of development assistance for Ghana during that period went into the agricultural sector (World Bank, 2007).

The second challenge inherent in development assistance is conditionality, a term used by the IMF to denote “the requirement imposed by the IMF that a borrowing country undertake fiscal, monetary, and international commercial reforms as a condition to receiving a loan for balance of payments difficulties” (Todaro, 1989, p. 618). These conditions have had a crippling effect on public spending in many recipient countries because the reform package typically demands severe cuts to public spending, in particular on health and education.

### Higher-income countries and lower-income countries

This is the binary most clearly associated with an economic view of the world. The World Bank's World Development Report uses this classification scheme, fully realizing that it is inadequate to cover the range of dimensions that ought to be taken into account in comparing different countries' development situation, provided one accepts the assumption that such comparisons make any sense at all. And yet, labels are assigned to most countries in the world and published annually in spite of the realization of the limitations imposed by a strict economic approach.

### Industrialized countries and less-industrialized countries

Todaro (1989) defined industrialization as "the process of building up a country's capacity to 'process' raw materials and to manufacture goods for consumption or further production" (p. 631). Industrialized countries are therefore those that have reached some threshold level of manufacturing capacity, whereas less-industrialized countries have not yet reached that threshold. The contradiction with respect to the relationship between industrialization and development assistance is blatantly obvious: Since the early days of colonialism, the colonizers had benefited from the extraction of raw materials out of the colonies and from depriving the latter of the ability to process their own raw materials. After the end of political colonialism, globalization took over this role based on the same relationship between the former colonies as raw material providers and the former colonial masters (and their offspring in the Americas) as processors of imported raw materials. The economically most powerful nations use their position to keep the prices for raw materials artificially low, while forcing the countries from which they obtain those materials into importing the value-added goods at exorbitant prices. Enabling the

providers of raw materials to expand their processing and manufacturing capacities translates into a direct loss of profit for the already industrialized nations. The politics of industrialization thus constitute a direct conflict of interest between the purported goals of development assistance provided by industrialized countries and their own economic interests.

### Majority World and Minority World

These are more recent terms which resulted from concerns around the traditional nomenclature. They are meant to be value-neutral and ignore economic indicators through focusing on population numbers. Majority World thus refers to those countries with similar socio-economic profiles that are home to the majority of the world's population, and Minority World are all those countries which do not find themselves in that group. The countries ordinarily referred to as developing countries therefore constitute the Majority World (often also referred to as the global poor), whereas the so-called developed countries are the Minority World. The Majority/Minority World concept attempts to provoke by turning our traditional understandings of different world segments upside down and by elevating the marginalized to mainstream status.

Although innovative and discursively critical of the dominant nomenclature around development issues, the concept of Majority and Minority Worlds is also fraught with difficulties. The determination of who belongs to the Majority World and who to the Minority World is obviously not made on the basis of individual countries' population figures (otherwise the U.S.A. would be a Majority World country), but is based on the notion that the globally poor countries as a group host the majority of the global population. In order to determine membership in one or the other of the two worlds, a

decision about whether a country and/or its peoples belong to the global poor is once more necessary, which, in turn, leads again to the question of which indicators to use.

The second problem with the Majority/Minority World concept is related to the existence of majority and minority populations not just in country comparisons, but also within each country. How to account for the fact that all countries host segments of the population who belong in the Majority World, and others who belong in the Minority World? The only distinction between countries in this regard is the relative size of the majority and minority population segments.

### The North and the South

The North-South binary (often also referred to as the Global North and the Global South) segments the world along geographic lines and proceeds on the assumption that the more advanced countries are found in the northern part of the globe, whereas the lesser developed countries are located in the southern hemisphere. From a strict geographical perspective, this concept is obviously nonsensical. Australia and New Zealand, for example, are two countries located in the South with high levels of income and high human development rankings.

Burbach (2001) noted that “the concepts of core and periphery, or North and South, are increasingly not geographic per se as much as they are social class in character” (p. 39). This expanded definition renders the North-South dichotomy even more absurd because different social classes, and thus different “North-South” populations, are found everywhere on the globe. In spite of the obvious inadequacy of this label, it is still widely used by some development agencies, for example the International Development Research Centre in Canada. The Global South and Global North are more recent concepts

that are meant to overcome the geographic dimension by emphasizing global economic inequalities.

### Third World, Second World, and First World

Todaro (1989) provided definitions for these three terms:

Third World [are] the present 144 or so developing countries of Asia, Africa, the Middle East, and Latin America. These countries are mainly characterized by low levels of living, high rates of population growth, low levels of per capita income, and general economic and technological dependence on First and Second World economies. (p. 650)

Second World [are] the now economically advanced socialist countries. Major Second World countries include the Soviet Union and other Soviet-type economies of Eastern Europe such as Poland, Czechoslovakia, and Yugoslavia. (p. 646)

First World [are] the now economically advanced capitalist countries of Western Europe, North America, Australia, New Zealand and Japan. These were the first countries to experience sustained and long-term economic growth. (p. 626)

Just like the concepts of North and South, the labelling of country clusters along geopolitical lines as Third World, Second World, and First World is dwindling in importance, for very apparent reasons (Burbach, 2001). The Second World has now disappeared, leaving only Third and First World, together with an increasing number of countries in transition. Of all the labels, this is likely the most divisive one in its assertion regarding the existence of different worlds. It arose out of a Cold War mentality whose underlying premise was focused on conflict, division and diverging ideologies. In the context of development, this label is thus very unsuitable to enable a paradigm shift

towards a unified world where inequalities increasingly diminish and where all humanity has the necessities of life, rather than one segment of the population living extremely well based on others living extremely poorly.

### The West

Terms like “the West” and “Western” are not normally used with an antonym. Originally signifying a geographic region, the West has become more or less synonymous with all economically advanced European-derived capitalist societies in North America, Europe, and including Australia and New Zealand. The concepts of West and Western are linked with the notion of modernity and modernism. Some of the characteristics of “modern society” include high levels of industrialization and of labour division, the rise of a mass society, and commodification.

### Postsecondary education and tertiary education

When referring to postsecondary education in this dissertation, I have meant to include all forms of formal education beyond the secondary level provided in institutions of teaching and learning. Postsecondary education includes university, vocational and technical education. I have used this term interchangeably with tertiary education. Where I have referred to university education or technical/vocational education, I have meant to explicitly exclude other forms of postsecondary education.

Critics may argue that, by trying to break down the binaries around country labels, I am diminishing the reality of two distinct worlds cohabiting on one globe, the world of the rich and the world of the poor. I maintain that the opposite is the case: If we continue to draw a sharp demarcation line between these two sets of populations and keep treating them as two distinct sets of peoples, we will keep reinforcing the dominant development

discourse which relies on such binaries. Only when we truly shift our thinking and actions towards treating humanity as part of one world in which humans live under vastly differing and unequal realities in inter-country and intra-country comparisons, can we hope to see a new discourse emerging that will ultimately foster development towards a more equal world.

### **Paradigms and Assumptions**

My inquiry is guided by a constructivist orientation based on my belief that social realities are shaped by a combination of factors including, but not limited to those which are social, cultural, political, economic, ethnic, and gender-related (Mertens, 2005). Knowledge about the contributions of the Cuban program to Ghanaian society cannot simply be dug up and cobbled together from bits and pieces of physical evidence. Rather, those contributions can be better understood through the complex network of relationships and lived experiences of those who participated in the program (Schwandt,, as cited in Mertens, 2005).

My research focuses on persons, processes and paradigms that are typically marginalized in a world dominated by a few powerful nations. I (1) foreground a socialist educational model in a predominantly capitalist world; (2) emphasize a South-South development model over the traditional North-South models; and (3) give legitimacy to the perspectives of knowers in the Majority World over the usual practice of giving legitimacy to developers of Majority World systems located in the Minority World. Ontologically, I assume that people's contextual knowledge, understandings, experiences and interpretations contribute to constructing the social reality of "development" (Mason, 2002). I take the position that there are multiple ways for societies to develop, and that

the “end product” of this process does not necessarily have to be a society modeled on today’s advanced capitalist societies. I argue that there cannot be any definitive answers to the question of what measures and activities contribute to the development process because the meanings attributed to the term “development” depend upon subjective definitions. How, for example, would one respond to the following questions:

- Who contributes more (if at all) to development – a physician in a remote rural area who attends to people that would not otherwise receive any healthcare; or a physician who joins an institution of tertiary education in order to train other health care professionals?
- Who is making a more significant contribution to development – an economist from a lower-income country trying to set up microfinancing schemes in her home country, or an economist who takes up a position with the United Nations Development Programme in New York?

The answer to these and similar questions can, in my perception, never be an ultimate truth, but will depend on a large number of factors, including the life trajectories, social and environmental contexts, and personal experiences of the respective persons and those with whom they interact. The multiple responses to such questions ought to be sought from those who are an integral part of contextual situations that are exogenously defined as being in need of development.

It follows from my ontological and philosophical position that a legitimate and meaningful way to gain a deeper understanding of the possible contributions of the Cuban scholarship program is through speaking with people who were involved in the scholarship program under study. My epistemological approach to this research is

grounded in a multivocal/reflexive and interpretive/exploratory framework (Mason, 2002). In the context of this framework, I will construct my arguments based on accepting the lack of an objective reality as a fact; rather, I will seek meaning through trying to understand and interpret the subjective positions of the persons at the core of my research. Listening to, reflecting upon and interpreting the multiple voices of graduates and administrators associated with the Cuban program is at the core of my epistemological position.

## **Chapter 2 – Review of the Literature**

### **Concepts Relevant to the Study**

As elaborated previously in this dissertation, my research builds on the earlier work undertaken by Hickling-Hudson that looked at the impact of the Cuban tertiary scholarship program on graduates from the Caribbean region and provided initial insights into the career trajectories of these graduates. The project is contextually situated within the rich body of literature on and the contested matrix formed by four distinct, yet interrelated topics: brain drain and brain circulation from lower-income countries; the link between tertiary education and social/economic development; South-South development co-operation; and postcolonial (tertiary) education. I will start with an overview of these four topics, expanding on how this study is situated with respect to each of the four topics. I will then provide a fuller discussion of the literature related to all four topics.

### **Brain Drain: The “Northern” Hunger for “Southern” Brains**

The notion of a brain drain phenomenon is intricately linked with my topic because much of the brain flow has been shaped by patterns of colonial domination and the subsequent postcolonial relations (Robertson, 2006). Jalowiecki and Gorzelak (2004) have defined “brain drain” as “the phenomenon whereby a country suffers an outflow of its educated elite, on a scale threatening the needs of national development in the long term” (p. 299). The second part of this definition is important because the brain drain cannot be a generic reference to high-skilled migration of all types; rather, it needs to be seen in terms of the impact that such migratory movement has on the source country.

The attraction of high-level migrants from lower-income countries is now commonplace in the more industrialized societies. Declining birth rates, aging and less productive populations, coupled with slow economic growth and major global competition have led these countries to introduce selective and somewhat aggressive immigration policies (Buchan & Sochalski, 2004; Roisin, 2004; Teferra, 2005). According to the latest World Migration Report (International Organization for Migration [IOM], 2005), the number of immigrants arriving under skilled immigrant categories as a percentage of total immigrants for major recipient countries like Australia, Canada, and New Zealand, is 60%, 55%, and 68%, respectively. The medical professions are particularly affected by brain drain, with the vast majority of permanent migrants in the health professions moving from the Majority World to the Minority World.

There is broad agreement amongst economists, development and human capital theorists that substantial levels of migration need to be understood in the context of global wage differentials. In the absence of short-term remedies to decrease such differentials, this study attempts to provide some answers as to whether the Cuban scholarship program can create a sufficiently large “pull home” effect to withstand the temptation of global wage differentials. In some African countries like Ghana, the situation has reached crisis or “brain haemorrhage” proportions where the flight of educated people is determined by the recipient country’s rules, not by the home country’s interests (“Fruit that falls far from the tree”, 2005).

The excess supply of skilled labour in some lower-income countries is another contested concept in light of the severe shortages of skilled human capital in many Third World societies. “Excess” in this context is measured against the availability of

employment opportunities, rather than the need for such skilled labour in the respective countries (Ouaked, 2002). In other words, a country might have, for example, more nurses than the budget of this country's health facilities permits them to employ. In this situation, the needs of the country's population with regard to nursing are not met, in spite of the availability of trained labour. In this study, I have given special attention to the factors that may have prevented the interviewed Ghanaian graduates from Cuba to take up employment at home, and which in some cases have resulted in emigration.

The pull factors existing in the North are fairly obvious, whereas the push factors that motivate skilled workers to leave their home country are more difficult to identify and necessitate qualitative information. In the health sector, it appears that most of the migration is demand-led through the shortage of health-care personnel in richer countries that do not produce enough health professionals of their own to address the health problems that are the natural consequence of aging societies (Aluwihare, 2005; Norcini & Mazmanian, 2005; Saravia & Miranda, 2004; Stilwell et al., 2004). This study will elicit some responses to the question as to whether the Cuban scholarship program and the Cuban educational model created a demand among the graduates who participated in this study to return and stay in their home country, outweighing the demand incentives offered by Minority World countries towards emigration.

Tertiary education is one of the principal conduits of permanent emigration, and the majority of skilled workers of foreign origin proceed to acquire specialized and postgraduate professional qualifications in the recipient country (Saravia & Miranda, 2004). According to the National Science Foundation of the USA, in 1995, over 1.4 million people, constituting 12% of all people with science and engineering degrees

working in that sector in the USA, were of foreign origin. Over 72% of these 1.4 million people were originally born in a lower-income country (Meyer & Brown, 1999). A study conducted by Pires, Kassimir, and Brhane (1999) to investigate the rates of return of African PhDs trained in North America during the period 1986 to 1996 concluded that there was a strong correlation between non-university funding sources (fellowship programs by source country governments and by host country governments) and high return rates. Because most lower-income countries do not have effective policies in place yet to curb the brain drain (Teferra, 2005), such programs thus constitute a potential vehicle to prevent nations in the South from training professionals for export to the North without any bilateral agreement on how the source country could be compensated.

As stated previously, the Cuban model of tertiary education scholarships challenges the brain drain phenomenon by actively encouraging the return of graduates to their home countries and requesting that they employ their skills towards the development process in their own societies. The model calls into question common economic perceptions of the brain drain which, in the words of Vinokur (2006), fail to look “at the dynamic consequences of the poaching game itself, a vertical power game of transferring costs and risks to the less powerful” (p. 20). Vinokur positions the brain drain debate squarely within the larger postdevelopmental discourse which sees the global equilibrium as dependent on the perpetuation of injustice. Apart from the obvious economic incentives of emigration, this study illuminates other factors that Ghanaian graduates from the Cuban program took into consideration in their decision to return (and stay) in Ghana, or to emigrate.

### **The Importance of Tertiary Education for Development in Lower-Income Countries**

The Cuban scholarship program is predicated on the notion that there is a positive link between tertiary education and economic development and growth, a view widely held among scholars and education specialists (e.g., Gandhi, 2000; Lakshmanasamy, 2000; UNESCO, 1998). Tertiary level enrolment has grown exponentially for the last 50 years for most regions of the world, with the exception of Sub-Saharan Africa (Schofer & Meyer, 2005). For many universities in the Majority World, it is difficult to shed the deep-rooted colonial philosophies of tertiary education. Teferra and Altbach (2004) pointed out that Africa has only about 300 institutions that qualify as a university within its 54 countries, and it is the least developed region globally in terms of tertiary institutions and enrolments.

In spite of the existence of a large body of literature on the topic, the mechanisms by which higher education fosters social and economic development in lower-income countries are not well understood, and precise tools are lacking to measure these relationships (World Bank, 2002). The link between development and education has in the past frequently been reduced to the application of human capital theory in the context of Majority World countries. More recently, the social dimensions of development have been considered in the context of social capital formation. At the same time, a new definition of development related to its political dimension has emerged: For people who have been oppressed, exploited, and humiliated through systems of colonialism, development can be seen as “liberation from social prejudices and the furtherance of human capacity for self-determination” (Nkulu, 2005, p. 83). Although education is still very much central to the development discourse dominated by the First World, the recent focus has shifted from seeing education simply as a mechanism for human capital

formation, to acknowledging the value of human development as an end in itself (Little, 1999), a concept which Sen (as cited in Manuh, Gariba, & Budu, 2007) distinguished from human capital by labelling it “human capability”.

With regard to this latter point, the Cuban scholarship program offers an interesting synthesis. It combines the concept of education’s intrinsic value of human development, as formulated originally by Che Guevara in the concept of the “new man”, with a utilitarian perspective of education that aligns educational programming very closely with the scientific/technical needs of society. Through using a qualitative approach, this study looks at the extent to which there is any evidence that the Cuban educational model and scholarship program have instilled in the interviewed Ghanaian graduates this holistic concept of education, and whether and how those graduates are subsequently translating the education they underwent in Cuba into the context of their home country.

Much of the existing research in this area is of a quantitative nature. Based on human capital- or social-rate-of-return calculations, economists have tried to estimate the contribution of education to society. These calculations neglect numerous benefits and costs arising from externalities, such as progress in the agriculture, health, and environment sectors; appreciation of diversity in gender, ethnicity, religion, and social class; and the contributions by social sciences and humanities programs to pluralistic societies (World Bank, 2002).

A notable exception is McMahon’s (1999) in depth-analysis of the higher education/development nexus in 78 countries: He employed a comprehensive measurement framework termed “endogenous development” which used econometric valuations to investigate both market and non-market and/or external effects on growth.

One of his principal findings was that rates of investment in higher education were only positively related to economic growth over the long run, and that the quality of higher education tended to deteriorate if the sector expanded too quickly in the early stages because a large number of graduates facing few jobs tended to be mobile and emigrate. The present study is of particular interest in the context of these findings because the Ghanaian students attended institutions in Cuba rather than at home, thus building up human capacity, but not tertiary infrastructure in Ghana. The frequent lack of relevance of educational offerings to job markets causes problems for students from the South studying in the North, and the links between the participating graduates' tertiary education programs in Cuba and their experiences integrating into the Ghanaian job market will be explored in this study.

A useful way of thinking about the education-development nexus comes from Müller (2004) who argued that human capital theory is instrumentalist in that it ignores individuals' development of personal identity and thus their ability to engage in new forms of agency that will ultimately benefit society as a whole. Müller pointed out that the narrow preoccupation with human capital has led to a focus on primary education amongst international donor agencies because the highest rates of return in the education sector arise in this area where costs are low relative to higher levels of education, and faster results can be achieved more easily. Müller's work echoed some of the ideas already formulated by Sutton in 1967 who raised the question of how students could be infused with concerns for national achievement and development, rather than a focus on individual achievement and career orientation. He argued for some level of "ideology" and "special efforts" to affect the character of student life. According to Sutton, "we

should not let our typical emphasis on the development of critical intelligence and mature individuality through higher education blind us to sociological facts” (p. 20). National pride and patriotism are important components of the Cuban education system, and this study will explore the extent to which these orientations were adopted by Ghanaians who studied in Cuba and were interviewed for this research project.

Woolcock (2002) built on these tenets and called for higher education programs that give students a sound theoretical and academic base in their respective disciplines, while also allowing them to get out into communities in order to understand the local context which helps them integrate different types and sources of knowledge. This claim is supported by the UNESCO (1998) which underscored the importance of aligning higher education more closely with the world of work through curricula that include work study opportunities and that assist the students in understanding working practices. The Cuban educational system embraces many of these notions with respect to education’s role in forming graduates with “rigorous depth and sympathetic breadth” (Woolcock, 2002, p. 31).

The Cuban scholarship program offers an alternative to students from lower-income countries studying in industrialized country programs. Weiler (1984) criticized the latter because the replication of structures adopted from countries with very different socio-economic realities inhibits the endogenous development in the Majority World. He spoke of two related “Third World dilemmas”: Dilemma #1 relates to students from the South encountering a lack of relevance in the subject matter and in the frame of reference in their North American programs. Dilemma #2 relates to a more fundamental concern with the existing degree of cultural dependence on countries at the centre of the world system.

This study takes into consideration the curricula which the Ghanaians studied in Cuba and their perceived relevance to the Ghanaian context. I examine how the participating graduates' broad humanitarian education and ability to engage with development issues might act as an enticement to work long-term towards endogenous development in Ghana.

### **“South-South” or “Horizontal” Development Co-operation**

The origins of South-South co-operation date back to the late sixties and early seventies when colonialism was formally coming to an end and the newly de-colonized countries tried to find ways to co-operate amongst themselves in the context of the new world order dominated by the Cold War and the existence of two powerful blocs of countries in opposing ideological camps (Abdenur, 2002). Over the past 30 years, South-South co-operation has been promoted by the UNDP throughout its activities in all regions and most sectors (UNDP, 2004). The various documents and declarations produced over the past decades by agencies like the UNDP constitute the overarching normative and intergovernmental framework for current South-South co-operation. It is highly paradoxical that a movement which started as a counterforce to the former colonial powers has, once again, been taken over by the dominant development discourse whose proponents are trying to “mainstream” South-South development co-operation into the global operations of organizations located in and controlled by the former colonial master states.

Not surprisingly, then, much of the literature on South-South co-operation focuses on trade or industrial operations, leaving a dearth of literature on the sharing of education models as a form of South-South co-operation. Due to their colonial histories, countries

in the South are still heavily influenced by education systems in industrialized countries and would therefore likely benefit greatly from indigenous Southern education models. Abdenur (2002) pointed out that much of the existing literature on South-South collaboration was prescriptive and technical in nature, and did not provide a framework for critical investigation of the worldviews on which these Southern relationships are premised. Meaningful South-South co-operation is more likely to occur if developing countries act on the recognition that they have much endogenous knowledge to share (Wolhuter, Steyn & Steyn, 2003).

The Cuban collaboration with other Majority World countries through the provision of educational scholarships operates without any involvement from the First World and thus provides a unique example of an applied South-South development relationship in regard to both scale and scope. The Cuban scholarship program has been praised for its achievements by the UNESCO (1998) in the context of the 1998 Declaration about Higher Education in Latin America and the Caribbean, which called for a new collaborative framework of mutual learning and greater horizontality based on considerations of solidarity.

The Cuban South-South collaborative approach is different from the practice in most industrialized countries in that it explicitly aims at educating professionals from other lower-income countries who will return home where they are expected to use their knowledge for the development of their home countries (Richmond, 1986). The traditional North-South or vertical model of international co-operation (Aragón, 1997) is frequently driven by market concepts of development, whereas this alternative South-South model of international co-operation emphasizes the idea of development with a

conscience and of international solidarity, aiming at the reduction of global inequities (Didriksson, 1997).

The extent to which a degree obtained in a highly industrialized country is relevant to the context of the Majority World has been challenged. Following a study of the education systems of South Africa and Madagascar, Wolhuter, Steyn, and Steyn (2003) pointed out that the borrowing from education systems in the industrialized world is problematic for developing country education systems, and that the latter have a lot of contextually relevant learning to share amongst themselves. International students often carry out research projects that are unrelated to what they will end up doing at home because the machinery and methodology used will frequently be unavailable in their home country (Myers, 1972; Weiler, 1984; Wolhuter, Steyn, & Steyn, 2003). In that context, the Cuban education system has made a concerted and integrated effort to enable graduates to address problems of material and social underdevelopment in postcolonial environments (Hickling-Hudson, 2000a). The program's development orientation is visible in the disciplines supported: Of the scholarships awarded to foreign students in 1983/84, 75% were awarded in the fields of technology, medical sciences, and agriculture (Richmond, 1986), and 96% of the students were from Latin America/Caribbean and Africa (Martín Sabina, 2002).

In 2001, of the total 191,000 students enrolled in tertiary education in Cuba, 10,700 or 5.6% were foreign students (UNESCO, 2004) – a ratio that resembles that of richer nations like Canada where during the same time period, 5.9% of all students were international students (CBIE, 2005). By 2005, the number of foreign students in Cuba had risen to approximately 18,000, constituting 6% of the total of about 300,000 students,

fuelled largely by the opening of the Latin American School of Medicine in 1999 and the International School for Physical Education in 2001 (Francisco Martínez Pérez, Ministry of Higher Education, personal communication, February 17, 2006). Since the opening of the Latin American School of Medicine, around 75% of all international scholarship recipients have studied in health-related programs (Francisco Martínez Pérez).

In contrast to most receiving countries in the North, the majority of international students in Cuba come from low-income countries and socio-economic backgrounds that would not allow them to study at an institution where they had to pay substantial tuition fees, or stay in a country where the costs of living are high. Richmond (1990a) pointed out that Cuba's scholarships to foreign students benefit persons whose educational opportunities would be limited in their country of origin, in sharp contrast to scholarship programs in higher-income countries that tend to benefit the children of the elites. The intention is to use education as a means of managing socio-economic inequalities to support the development process in the South, and in particular the Caribbean region (Martín Sabina, 2003; Morles, 1997; Mulot, 2004; Tristán Pérez, 1992; Tünnermann Bernheim, 1997).

Critics have in the past seen this program as an attempt by the Cuban government to indoctrinate students throughout the region with a socialist perspective in order to secure geo-political support for the small island nation, particularly in light of the constant political and economic threat from the United States of America. In fact, the argument has been made that the Cuban government uses the scholarship system strategically to support states that have adopted a Marxist-Leninist or socialist model. Yet, the fact that there are few such states left globally, as well as Cuba's continued support for

progressive anti-imperialist, but non-Marxist/Leninist or socialist states, already challenged this argument 20 years ago (Eckstein, 1985). It is even less pertinent today at a time when students from a wide variety of countries, including economically deprived students from developed countries, study in Cuba on full scholarships (Burley, 2006).

### **Colonial Legacies and the Postcolonial Stance**

Hickling-Hudson (2000a) distinguished between two dimensions of meaning with respect to postcolonialism: “the attainment of independence from European colonialism, and the description of a set of practices, discursive and activist, which embody the tension in the response to colonialism since its inception” (p. 189). The term postcolonialism carries the notion of a lingering and problematic legacy of colonialism for the former colonies, a gradual and often painful process of disengagement from the colonial experience, rather than the sudden arrival of a new era (Crossley & Tikly, 2004).

Postcolonial theory deals with the process of colonization and the resistance by former colonies to free themselves from what has been termed the “colonial syndrome” (Chilisa, 2005, p. 665). It is used to “analyse discursively the continuing legacy of European imperialism and colonialism and to uncover the oppositional discourses of those who have struggled against its lingering effects” (Tikly, 2004, p. 173).

The collaboration between Cuba and African countries occurs against this background where education in Africa is seen by critical scholars and practitioners in both the majority and Minority World as “a journey fuelled by an exogenously induced and internalised sense of inadequacy in Africans, and endowed with the mission of devaluation or annihilation of African creativity, agency and value systems” (Nyamnjoh, 2004, p. 168). Nyamnjoh classified education in Africa as cultural violence, brought

about by the export of Western epistemologies to educational systems and curricula.

Universities in Africa set up towards the end of or after the colonial period were born into the relationship of dependence from European institutions. They frequently lack relevance and continue to be subjected to external domination in their intellectual structure and curricular offerings (Samoff & Carrol, 2003).

Nkulu (2005) interrogated the African situation within the philosophical framework of John Dewey whose concept of “practical knowledge” reconciled the liberal education perspective with the utilitarian perspective of education, arguing that analytical and critical thinking ought to be combined with skills acquisition in order to achieve maximum results (Dewey, as cited in Nkulu). Dewey’s formulations are closely related to the vision of Julius Nyerere, the former president of Tanzania and life-long educationist, who designed his concept of human-centred development based on the education of people that would instil in them a desire to work towards positive transformation of their societies (Nkulu). Nkulu concurred that a pragmatic approach ought to be adopted for the role of higher education in postcolonial societies. In this context, Kallaway (2001) pointed to the lack of vocational education in Africa, arguing that the respective development strategies formulated in the early post-independence years, which heavily emphasized rural vocational and agricultural education, had not come to fruition during later years.

Africanization of the curriculum has become an increasingly popular concept on the continent, denoting a slow process of moving curricula away from their colonial origins to incorporate more indigenous knowledge and traditions. However, especially at the tertiary level where the Africanization movement is less advanced than at lower levels,

curricula still follow mostly the European tradition (Nyamnjoh, 2004; Szymanski Sunal, 1998). Sewpaul (2004) argued that the universal acceptance of an African identity is problematic and that Africa should not be reduced to a single worldview or condition that would be taken as being reflective of the whole African continent because “common experiences and struggles do not translate into a black essence and a single African identity” (hooks & Appiah, as cited in Sewpaul, p. 10).

Many of the decolonization efforts and successes of the early postcolonial period were nullified, however, by the advent of structural adjustment programming in the late 1970s and early 1980s. Federici and Caffentzis (2004) outlined that these policies represented an attempt to recolonize the Majority World in the context of globalization, and that the purpose and consequences of these programs in the area of education were twofold: (1) to downgrade African higher education through defunding at all levels and thus making it inaccessible to many students; and (2) to create professionalization programs run by expatriate personnel that served the neoliberal philosophy of the World Bank.

In this complex web of philosophical concepts and political realities of postcolonialism, the Cuban educational model and its application to Ghanaian students via the scholarship program pose a number of poignant questions:

- To what extent has the Cuban scholarship program and educational model achieved the goal of effectively combining the liberal and utilitarian principles of education?
- Has the Cuban program managed to invalidate the hegemonic conceptions of development and underdevelopment, and has it started connecting students from regions as far away as West Africa with their own histories and identities?

- Does the Cuban model defy global imperialistic schemes that serve the interests of industrialized countries?
- To what extent have Ghanaian societal institutions at large supported a vision of education that rejects colonial intellectualism and embraces a model of education that is responsive to the country's context (Nkulu, 2005)?
- How relevant is an educational program devised and delivered in a country free from any structural adjustment conditionalities to a country that has been in the grip of such conditionalities since the 1980s?

While these questions are beyond the scope of this study and would necessitate a full program evaluation, the study has elicited some preliminary responses based on the experiences reported by a group of graduates and former program administrators interviewed in the context of this research.

I will now discuss the relevant literature on these four themes in more detail.

## **Review of Related Literature**

### **South-North Migration of Skilled Labour and its Consequences**

The brain drain, a term describing the move of students and highly skilled labour from countries that appear least well positioned to sustain such loss, has become a controversial economic and political debate. Concerns about brain drain from lower-income countries, however, have not just emerged recently. Brain drain was already discussed extensively throughout the 1960s, and in 1975, a conference took place in Bellagio, Italy, that brought together specialists in order to discuss the merits of a proposal to impose a tax on highly skilled persons from developing countries who reside in developed countries (Grubel & Scott, 1977). In 1967, Thomas suggested that the

biggest receiving countries like the U.S.A., Canada and Australia were importing professional human capacity on a considerable scale. The U.S.A. were then the world's largest exporter of physical capital and its largest importer of human capital. Chief net importers of human capital were deriving a national advantage, whereas the net exporters, particularly the lower-income countries, were losers.

Brain drain is still or even more of a concern 30 years later, and the tax proposed in 1975 in Bellagio was never put into place. The attraction of high-level migrants, in particular from lower-income countries, is now commonplace in the more advanced countries. Today, the largest movement of skilled labour is from less developed countries to post-industrialized countries (Iredale, 2001). Although concrete data availability remains a challenge, in particular on the source country side, a lot of anecdotal evidence is available. It is also known that the proportion of the population migrating from both developing and industrialized countries is greatest among the most highly educated (Saravia & Miranda, 2004). In 1990, about 95,000 out of the 128,000 African immigrants in the U.S.A. at the time were highly educated persons (Carrington & Detragiache, 1999).

Some quantitative data, however, exist from particular geographic contexts and sectors: Saravia and Miranda (2004) reported that among all foreign students who graduated with a doctoral degree in science and engineering in the U.S.A. in 1995, 79% of those from India and 88% of those from China remained employed in the U.S.A. Using data from the National Science Foundation in the U.S.A as a basis, Meyer and Brown (1999) hypothesized that the number of skilled employees in science and engineering originally from a lower-income country and working in research and development (R&D) in the triad of the U.S.A. – European Union – Japan, was about

400,000 people. The total home-based R&D personnel in lower-income countries is about 1.2 million. Given that countries like Australia, New Zealand, or Canada are not included in this analysis, the assumption that the R&D workforce originally from poorer countries and currently employed in highly industrialized countries represents one third of the home-based workforce is a fairly low estimate.

The medical professions are particularly affected by brain drain. The vast majority of permanent migrants in the health professions move from the South to the North. The scale of the brain drain problem in the health sector is massive. Again, although available data from Ghana are incomplete due to limitations on consistent statistical data gathering methods, some anecdotal evidence can be gathered from different data sources (Twum-Baah, 2005). Statistics from the Ghana Immigration Service show that the country has had by far the most departures of all African countries over the period 1999-2002: Most of this migration has been intra-regional to other West African nations, however, more recently, North America and Europe have gained importance as receiving regions (Twum-Baah). Twum-Baah stated that in 2003 there were 310,977 Ghanaian emigrants residing in Europe, and 150,572 Ghanaian emigrants residing in North America (U.S.A. and Canada). A high percentage of Ghanaian emigrants in the U.S.A. and in England/Wales were employed in highly-skilled professions (Twum-Baah). Ghana has more doctors working outside Ghana than in the country itself (Nullis-Kapp, 2005). Between 1986 and 1995, 61% of the graduates from the University of Ghana medical school left the country, resulting in an estimated loss of US\$ 5,960,000 in tuition expenses (Dovlo, 2003). These figures are consistent with UN findings claiming that at least 60% of medical doctors trained in Ghana are working outside the country (as cited

in Adepoju, 2005). This imbalance is reported to be even greater for nurses (Chanda, 2002). The doctor-population ratio is less than a third of the ratio for the U.S.A, and in the past decade, Ghana has lost 50% of its professional nurses to the higher-income world. In 2002, the vacancy rate for registered nurses in the country was 57% (Dovlo, 2003). Based on data by Carrington and Detragiache (1999), Beine, Docquier, and Rapoport (2003) reported that the overall brain drain rate from Ghana was 25.7%. According to the Institute for Statistical, Social and Economic Research in Accra (2003), the proportion of general practitioners and medical officers leaving Ghana as a percentage of those trained in the country shot up steeply from an average of 64% between 1995 and 2000, to 89.6% in 2001 and 94.4% in 2002 (as cited in Anarfi, Kwankye, Ababio, & Tiemoko, 2003).

The brain drain is not restricted to the health sector, though: the flight of academics from higher education institutions in Ghana has also had an impact. Statistics from 2004 regarding the public tertiary education sector showed that all disciplines except medicine were understaffed, with education worst affected (Manuh, Asante, & Djangmah, 2005). This situation has long-term negative implications for lower levels of education and educational administration, management and planning since bloated students/staff ratios compromise the quality of teaching and learning. Although medical practitioners and nurses may represent only a small proportion of highly skilled workers who migrate, the loss for lower-income countries of human resources in the health sector may mean that the capacity of the health system to deliver health care equitably is significantly compromised (Stilwell et al., 2004). A report dated 30 November 2005 in *Africa News* (as cited in Vinokur, 2006) stated that 43% of South African medical graduates had

emigrated to higher-income countries and had been replaced with medical staff from neighbouring, poorer countries, thus creating a vicious circle in the region. Dovlo (2003) outlined that several African countries have addressed their severe shortage of physicians through bilateral agreements with Cuba under which Cuban doctors are dispatched to those countries to fill the gaps.

Several authors (Ahmad, 2004; Scott, Whelan, Dewdney, & Zwi, 2004) have agreed that poaching of skilled health professionals is potentially damaging to the effective delivery of health services in the source country. In this context, Ahmad pointed to countries like Germany and the United Kingdom that are instituting aggressive immigration policies which target specifically the best minds among professionals from lower-income countries. Gaps exist with respect to both quantitative and qualitative data. Data from recipient countries are somewhat more reliable than data from source countries because exit visas are not compulsory in most countries and emigrants are not normally interviewed (Buchan & Sochalski, 2004; Diallo, 2004; Stilwell et al., 2004). Identifying the push factors that motivate health workers to leave their home country is particularly difficult and necessitates qualitative information.

In this literature review, I have focussed on the impact of the brain drain on the source country, rather than on the destination country. Although it is recognized that in-country migration from rural to urban areas and lower- to higher-income areas also causes challenges, the focus of this review is on inter-country rather than intra-country migration patterns.

Teferra (2005) has described the brain drain as the migration of high-level expertise. In severe cases of skilled labour outflow, he has spoken of brain haemorrhage,

similar to Ouaked's (2002) concept of brain desertification experienced by some of the poorest regions. These terms have an inherently negative connotation. More positive and more recent discursive terms describing these and related processes include "brain circulation", "brain gain", "brain exchange", "brain mobility", "brain trust", and "brain chain" (Teferra, 2005, p. 229). According to the International Organization for Migration ([IOM], 2001 and 2003), brain circulation only truly occurs when the source and the recipient countries benefit from human mobility in a somewhat equitable and comparable manner, and the term is thus frequently used in the context of the movement of highly skilled people within Africa rather than out of Africa.

Jalowiecki and Gorzelak (2004) saw brain gain as a concept "coined in the 1990s to describe collectively the attempts, efforts, programmes and projects aimed to draw scientific workers to a given country" (p. 299). Other more neutral terms are migration (more descriptive and not specific to the outflow of personnel from scientific, research, and tertiary education institutions), and mobility (most universal, includes both migration abroad and transfers between jobs).

In the form most frequently used (the loss of valuable skilled personnel from developing to more developed countries), the concept of brain drain emerged as an international problem in the period following the Second World War when the winner countries needed high-qualification specialists for their scientific and technological development (Iredale, 2001). Highly skilled workers are defined as having a tertiary education or extensive/equivalent experience – a professional job - in a given field (Iredale; Stilwell et al., 2004).

The concept of brain drain is situated within two overlapping strands of literature: international migration, and human capital and growth (Vidal, 1998). Human capital theory is used by some authors, especially economists, to understand and explain the motivations for international migration, in particular those movements that result in the brain drain phenomenon. Lucas (1988) defined the field of human capital theory as a “formalism that leads us to think about individual decisions to acquire knowledge, and about the consequences of these decisions for productivity” (p. 15).

In an earlier foundational work, Grubel and Scott (1977) saw human capital theory based on the notion that each person has attached to her or him an amount of wealth equal to the present value of her or his net future earnings. The person can increase future earning power through a number of measures, including occupational and regional mobility. This is consistent with Iredale (2001) who regarded people’s moves to find employment and remuneration more appropriate to their formal education and training as a manifestation of human capital theory. The structuration approach (based on Goss & Lindquist, as cited in Iredale) treats skilled migration as a more complex process: It incorporates individual, structural and institutional elements, and examines considerations of private and state agents to actively recruit to fill labour needs.

The general concept of human capital theory will be more closely examined later in this chapter, and I will initially focus on this theory only as far as it relates to migration theories and concepts. Based on human capital theory where human capacity is a capital good that has no market price, gains and losses associated with the movement of skilled labour can basically be measured in two ways: by adding up its production costs through estimating the expenditures made to produce the human capital good (retrospective

method), or through a yield rather than cost approach by capitalising the value of the anticipated revenues from human investment (prospective method) (Schultz, 1961; Vinokur, 2006). These two approaches have been combined in a rate-of-return approach to education: Calculations can either be made at the level of private rate-of-return for individuals, or at the level of social rate-of-return for the benefits of education to society at large (Alexander, 2001). The retrospective method is typically applied by the source countries, whereas destination countries tend to use the prospective method which is more conducive to showing net benefits to both countries involved.

This gain-loss analysis of the impact of skilled migration on countries of origin is complex because it rests on a quantitative approximation of an essentially qualitative good. The IOM (2003) concluded that, although emigration leads to a significant loss of skills available for development, it can also lead to a more efficient allocation of human resources in regions such as Africa. Skilled migration thus has the ability to decrease social tensions, while at the same time leading to the transfer of significant parts of the migrants' earnings back home. However, the IOM went on to state that outward migration does lead to a substantial lack of human capital in the worst-affected sectors such as health, education, and technologies, that are key to national development. Neither the return of a small percentage of migrants, nor the recruitment of expatriates as replacements (at a steep price) for a short term, would be able to offset the capacity lost through outmigration, a situation that would therefore hamper any sustainable development.

Estimating the economic gains and losses through migration necessitates that decisions be made on the unit to which gains or losses pertain - individual, enterprise,

nation, world (Myers, 1972). The gain-loss equation may yield widely diverging results, depending on the unit chosen as the basis for such a calculation. The criterion for judging gains or losses poses another problem: Myers outlined how emphasis might be placed on “economic growth (usually maximization of Gross National Product), on social welfare (usually inferred from what happens to per capita incomes of the relevant population), on income distribution (among either individuals within a nation or among nations . . .), or on the loss of the flow of savings and taxes” (p. 175).

Chanda (2002) pointed to the need to distinguish between short-term and long-term movements of people. In the short run, increased mobility in sectors like health care can generate remittances (Jacky Kaba, 2004), help promote exchange of clinical knowledge among professionals, and help upgrade skills and standards in the poorer country. This is, essentially, the argument made by proponents of brain circulation. However, if outflows are permanent, there are potential adverse implications for equity, quality, and availability of health services in the source countries. The bulk of outflows of health care professionals from the Majority World is indeed permanent. The need to situate any analysis of brain drain within the context in which the phenomenon occurs has been echoed by Ouaked (2002) who asserted that impacts vary by professions and types of skills held by migrants, as well as by specific country context. For example, the loss of health care professionals has a potentially greater short-term negative impact on the health status of residents than the loss of health researchers. In the long run, the loss of health researchers might hamper development more severely than the loss of health care professionals.

Ouaked (2002) emphasized that brain mobility does not automatically translate into brain drain. There can be an array of policies with the potential to offset possible adverse effects of skilled mobility and to leverage flows into positive outcomes for source countries. The author argued that a key element is the improvement of the population's general level of education that will lead to an increase in labour productivity and wages. Ouaked stated that some skilled circulation between lower- and higher-income countries was needed because international experience is extremely important today. Teferra (2005) challenged this argument by maintaining that no amount of brain circulation could fully compensate for what is lost to massive brain drain. Jacky Kaba (2004) envisaged long-term benefits of African brain drain to the African source countries by comparing the situation with the flight of Europeans before and after World War II, and the potential for Africans to rebuild their continent following war and unrest. This is a problematic argument based on historically and structurally very different situations. Currently, there is no evidence available that would support this hypothesis.

Turning to some of the common theories formulated by economists and development theorists on the topic of skilled human migration and the brain drain, the seminal work carried out in the 1960s and early 1970s ought to be considered. Grubel and Scott (1977) approached the topic from the perspective that the concern with the brain drain was about the large amount of human capital moving with the migrant. The authors argued that, in the real world, it was extremely difficult to determine with any preciseness whether emigration increases or decreases the welfare of those left behind and of those who make up the total original population (including the emigrated professionals): "Gains and losses cannot be established scientifically because interpersonal comparisons

of utility cannot be made” (p. 38). Grubel and Scott claimed that this was the reason as to why there was a lot of disagreement amongst theorists about the consequences of the brain drain. They proceeded to outline the problems of defining and counting brain drain migrants and, consequently, the difficulty in determining what they called the “welfare” effect, i.e., the net effect of migration on the source country. The authors concluded that, depending on which economic model was adopted, highly-skilled migration might reduce total output of human capital; might increase or decrease per-capita income of the population remaining in the source country; or might leave unchanged the income and welfare of those remaining behind.

Thomas (1967) analyzed Grubel and Scott’s arguments based on some of these authors’ earlier work. Grubel and Scott (as cited in Thomas) argued that emigration should be welcomed whenever the emigrant improved her/his own income and whenever the migrant’s departure did not reduce the income of those remaining behind. They analyzed the circumstances under which this second condition held true and concluded that the emigration of highly skilled persons reduced the welfare of the remaining people under rare circumstances only and tended to increase the welfare of their former fellow countrypeople in several respects. Thomas disagreed with this position and supported Johnson’s (as cited in Thomas) argument that

if education is financed wholly or partly by general taxation of the resident population, every emigrant takes with him a gift – in the form of the education he has received. ... To put the point another way, the region of immigration gets the right to tax the high income made possible by an educational investment it has not

paid for, while the region of emigration loses the opportunity to recoup by taxation the cost of the educational investment it has made. (p. 492)

Thomas acknowledged that human capital was highly mobile internationally and flowed to areas where real productivity per head was highest. It thus constitutes a gift from areas which incurred the costs of investment, whereas a return flow of benefits is normally not inherent in the process. Over 40 years ago, Thomas thus concluded that immigration policy in many advanced countries had come to resemble tariff policy as a flexible instrument for pursuing national advantage, a situation that is in many ways more acute today than ever.

Shearer (1966) took issue with Grubel's earlier formulations that stressed the neutral effect of outmigration. Shearer systematically debunked all of Grubel's arguments, maintaining that the latter's case was based on orthodox economic theory which was inapplicable to the real-world problem of migration from lower-income countries. In orthodox economic theory, humans would respond to economic motivation such that emigration in a particular profession would lead to higher wages due to short supply of labour, which in turn would entice more people to enter this profession and thus compensate for the loss.

Building on Grubel and Scott's formulations, Stark (2004) also argued from a neoliberal economic perspective and postulated that the potential for outmigration will entice the source country to invest in human capital formation, thus creating a welfare gain for the nonmigrants. Stark built his argument on a hypothetical economic formulation that shows how higher prospective returns to human capital in a foreign country positively impinge on human capital formation decisions at home.

Both Stark's and Grubel and Scott's lines of argumentation are simplistic because these authors fail to take into consideration the context of many developing countries that face ongoing challenges due to postcolonial conditions; have to adhere to structural adjustment policies imposed by international financial institutions that prevent large-scale state injections into the education and training system; and face a shortage of training opportunities to replace the outmigrants with other people entering the profession.

Maurice Schiff (2005) from the Development Research Group at the World Bank reacted to this new brain drain doctrine proposed by Stark and summarized the "new" brain drain literature which introduced the notion of a brain-drain induced brain gain that more than offsets the negative effects of the human capital outflow. Some of the main proponents of this theory are Stark (2004), Mountford (1997), Beine, Docquier and Rapoport (2001), and Vidal (1998). The principal argument of all these authors rests on the assumption that higher potential salaries in another country will provide an incentive for lower-income countries to invest in human capital, thus creating a positive impact on human welfare. Schiff rejected the net brain gain argument and claimed that a number of effects are neglected by proponents of the "new" brain gain hypothesis, all of which result in a smaller brain gain and ultimately a net brain drain effect. He conceded that a beneficial brain drain might arise at low migration rates; however, high migration rates inevitably result in a lower rate of growth, and countries like those in the Caribbean and Sub-Saharan Africa that have massive outflows of medical personnel and other skilled workers will not benefit from any brain gain effect.

One of the most poignant and scathing criticisms of earlier economic models of brain migration comes from Vinokur (2006) who argued that the difficulty with

formulating a reliable theory of brain gain and brain drain does not lie in the lack of empirical data, but the conceptual framework used by most economic models. Vinokur contended that “this debate is fundamentally about property rights. As human beings cannot legally be bought and sold, the problem for those who have paid for the education of the [highly skilled] workers is to secure the returns from their investment” (p. 10).

Vinokur equally criticized the neoliberal theories for failing to take into account the externalities of human capital which arise from collective learning and agglomeration effects at the societal level. Vinokur argued for an alternative perspective in light of new realities: Given the transnational nature of present capital funds and the ability of transnational corporations to move their workforce and their profits regardless of national borders, and given the fluidity of time in terms of lifelong education of migrants who alternate between studies and productive work, she suggested typologies of brain migration where geographical mobility is no longer the only dimension.

Many authors have noted that contributions to the source country from those living in the diaspora need to be taken into consideration when assessing brain drain and brain gain, and the overall impact of migration on developing countries. The “traditional” brain drain literature has assessed the negative impact of the outflow of human capital from developing countries against the benefits arising from brain drain, including increased trade, remittances, knowledge, capital flows, and foreign direct investment (Schiff, 2005). Remittances can be defined as “the portion of an international migrant’s earnings sent back from the host country to the country of origin” (Puri & Ritzema, as cited in IOM, 2003). For Ghana, private remittances have been higher than foreign direct investment or official development assistance since 1999, with the gap between remittances and the two

other sources of income growing wider in recent years (Addison, 2005). In spite of their size and the relative consistency of remittance transfers, Black (as cited in Addison, 2005) noted that “gaps still remain in our understanding of how remittances are or can be used to promote development, especially since existing policy incentives are not generally considered as having been very effective in channelling remittances towards development.”

Chanda (2002) warned that remittances arising from human resource outflows do not automatically balance the loss incurred from such outmigration. Although those in the diaspora on occasion make donations for public services such as hospital and school infrastructure and equipment, or community infrastructure – for example, water pumps or electricity plants – (Manuh & Asante, 2005), such payments do not constitute the majority of remittances. Most remittances benefit individual private households, rather than the collective population of the source country. In a study of migration from and remittances to Latin America, Orozco and Lapointe (2003) found that Mexican families spent over 75% of remittances received on basic items such as food and clothing. In Nicaragua and El Salvador, over 75% of all recipients spent all the remittance money on food alone. Although such spending patterns are certainly poverty-reducing, they hardly contribute to longer-term sustainable development. Addison (2005) also pointed to the “poverty reducing and income distribution effect” (p. 133) of remittances, but acknowledged that such transfers can create a “culture of dependence” which does little to enable the recipients’ country to find solutions to its development challenges. Based on a study conducted in Ghana, Addison likewise reinforced the point that a large percentage of remittances are used on daily expense items, and little is invested productively. Even

the poverty reduction argument can be challenged: Mazzucato, van den Boom, and Nsowah-Nuamah (2005) showed that remittances by Ghanaian emigrants were skewed towards the richest quintile of the home population, thus compromising the positive impact on the poorest part of the population.

These income distribution and reallocation consequences need to be considered in assessing the benefits of remittances that do not do the public sector any good, unlike the direct benefits from retaining domestic health professionals. Although some countries have introduced schemes to leverage income from remittances by redirecting resources from spending on consumer goods to investment in various ventures for the benefit of communities (Orozco & Lapointe, 2003; Saravia & Miranda, 2004), Ouaked (2002) and Teferra (2005) cautioned that the reliance on remittances varies considerably by country, and that even with successful brain circulation schemes, Africa in particular will continue to face massive outflows of talent and skills as long as socio-economic and socio-political environments do not improve considerably.

Some innovative programs have been put in place to harness the potential of diaspora communities: The International Organization for Migration (n.d.) operates a program on migration and development for Africa under which emigrants engage in “virtual returns” through video link-ups with their home country where they teach fellow countrypersons. The Association for Higher Education and Development ([AHED], 2004) carried out a case study on diaspora communities of Ethiopian origin who live in Canada, in order to explore the role of the diaspora of one of the world’s poorest countries on the UNDP Human Development Index in the context of Africa’s capacity building. So far, the Ethiopian diaspora has made large cash contributions to families

back home; however, no longer-term initiatives that respond to the development needs of Ethiopia have been recorded, thus affirming the argument advanced earlier about the private nature of remittances.

An “excess supply” argument has been proposed in some circles and by certain authors who claim that the emigration of trained people is not so much a “brain drain” but an “overflow” of human resources that cannot be absorbed by the economies of poorer countries (AHED, 2004). Although this might be a correct description of the situation in some countries, it does not mean that these economies would not need these human resources in order to meet the social and human needs of their populations. The “excess supply” of skilled labour thus has to be seen concomitantly with the excess demand for absorptive infrastructure.

Study abroad patterns tend to have a powerful impact on migration. Two-thirds of foreign-born scientists and engineers working in the United States, for example, earned their doctorates there (Meyer & Brown, 1999), and between 47 to 80% of students earning a PhD in the U.S.A. were born in a different country (Vinokur, 2006). Half of foreign-born graduate students in France, the U.K. and the U.S.A. are believed to remain there after completing their studies (Martin, Terouanne, & Neher, as cited in Saravia & Miranda, 2004). Half of the physicians from Portuguese-speaking African countries who are practising in Portugal went to medical school there and stayed after having built significant social and cultural ties during their studies (Stilwell et al., 2004).

A growing number of developing country students are studying for qualifications offered by higher education institutions in higher-income countries. They either reside in the higher-income country to obtain their degree, or they study in their home countries

through distance programs offered by the Minority World institution. A Western degree is often seen as a ticket to employment in a higher-income country, and skilled migrants are frequently former students of tertiary institutions in these countries or in offshore institutions of these countries (Iredale, 2001). The quality of overseas education adds to the weight of brain drain pull factors because overseas education is frequently considered better than education offered in national institutions (IOM, 2001 and 2003).

Pires, Kassimir, and Brhane (1999) undertook a study to investigate the rates of return of African PhDs trained in North America during the period 1986 to 1996. These authors concluded that a study of actual career trajectories over time for graduates from particular degree programs would be of immense value in order to gain a better picture regarding the impact of these programs on development. The authors cautioned that those who do not return might still be contributing to home country development and human capital formation, whereas those who return might make limited contributions depending on their career path. Blaud's (2001) in-depth study of educational migration and the question of return and non-return amongst African students from Ivory Coast, Cameroon, and Senegal, who studied in higher-income countries, revealed that the factors impacting on the students' decision to return or not to return to their country of origin were multi-faceted. Although economic and political considerations were important, other factors included social and personal characteristics and circumstances, cultural adaptation, discrimination, and family pressure. In this context, Laczko (2005) pointed to the importance of regulating student migration and thus limit the risk of brain drain. He highlighted a recommendation by the Organisation for Economic Co-operation and

Development (OECD) for developing countries to provide conditional scholarships to students which would encourage the students' return.

The financial loss suffered through skilled migration is considerable: Ngunjiri (as cited in AHED, 2004) reported that it costs between US\$10,000 and US\$15,000 to educate a student for four years in Kenya, and nearly US\$ 40,000 to train a physician. Another study (Crush, as cited in Jacky Kaba, 2004) put the figure for training of South African doctors at US\$ 150,000. The AHED estimated that Africa trains about one-third of its professionals for export to richer nations without any kind of bilateral agreement on how the source country could be compensated.

In order to devise suitable policies to address the adverse impacts of the brain drain, its root causes need to be well understood; in particular, both "pull" factors and "push" factors have to be considered (Ahmad, 2004; IOM, 2003). The IOM (2003, p. 218) provided a good summary of those factors:

*Push factors* (associated with conditions in the source country)

- poor socio-economic living conditions;
- unemployment, increasing the dependency burden of household wage-earners;
- drops in real income, currency devaluation and rising cost of living;
- rigid government employment systems;
- professional isolation;
- tribal/ethnic discrimination in appointments and personnel policies;
- corruption;
- employer discrimination against the qualifications held (e.g., bias against degrees obtained in former socialist countries).

*Pull factors* (associated with conditions in the recipient country)

- higher salaries relative to home country;
- greater job mobility and professional career development;
- fewer bureaucratic controls and higher standards of living;
- acquisition of high-level skills;
- foreign scholarships and educational support;
- active presence of recruitment agents.

Push and pull factors do not work independently of each other; rather, they work in tandem in that “push factors usually create the desire to emigrate, while pull factors provide the opportunity to act on that desire” (Okome, 2005, p. 86). Okome discussed these factors as going beyond having their roots in individual countries. He positioned immigration squarely within the globalization debate, arguing that push and pull factors now have world system origins, resulting in system-wide effects.

Grubel and Scott (1977) categorized policies to stop the brain drain into four major groups:

- (1) reduction or narrowing of income differences globally;
- (2) narrowing the opportunity gap regarding personal and professional development globally;
- (3) making migration more difficult or less rewarding to migrants; and
- (4) bilateral intergovernmental compensation schemes whereby recipient countries would compensate source countries for the value of the educational subsidy provided to highly educated migrants.

All of these suggested policies address both push and pull factors to a certain extent.

According to the authors, brain drain reduction policy group number ...

- (1) is a long-run solution whose attainment is of critical importance for many reasons besides the reduction of the brain drain.
- (2) calls for more realistic human resource planning in lower-income countries through, for example, better integration of foreign studies and the professional skills needed in the developing parts of the world, as well as more status recognition for achievement; however, such improved human resource planning and ensuing relief of brain drain is hardly attainable in the near future.
- (3) is attainable rather quickly through administrative changes in recipient countries that would increase foreign student return, eliminate immigration provisions that discriminate in favour of highly skilled persons, or through the imposition of an emigration tax in the source country; however, there are significant disadvantages to all of these policies.
- (4) does not attempt to reduce the extent of the brain drain but rather provides compensation to set off some of the loss; it would be simple to administer and would use data already collected by immigration authorities, although the setting of compensation rates would remain challenging.

Grubel and Scott saw as desirable those policies that attempt to reduce the brain migration by narrowing income and opportunity gaps among nations. One disadvantage of such policies is the long time period required for them to become effective. On the other hand, policies designed to make migration more difficult, either through changes in national laws on immigration or through the imposition of taxes on emigrants, are less

realistic from a political perspective. They will likely create inefficiencies, involve very high administration costs, and lead to loss of personal freedom. Grubel and Scott argued strongly for intergovernmental compensation schemes by which educational subsidies invested in the emigrants by the source country would be repaid by the recipient country (see also Aluwihare, 2005; Buchan & Sochalski, 2004; Scott, Whelan, Dewdney, & Zwi, 2004; Stilwell et al., 2004). Grubel and Scott clearly favoured this fourth policy prescription based on the neoliberal notion of the tradability of human capital as a factor of production, with the compensation scheme acting as payment for such “human trade”.

Further to Grubel and Scott’s third point above, Miyagiwa (1991) questioned the logic of an emigration tax: In order for a highly progressive tax on emigrants to be able to prevent further brain drain, the respective tax revenue would have to be given to those most likely to emigrate in order to discourage them from doing so. However, this will result in a policy environment of making the rich richer. Other authors (Saravia & Miranda, 2004; Chanda, 2002) have seen a need to look for ways through which the direct beneficiaries of emigration would reimburse their country of origin through a fee for training they received in the home country, to be deposited in a national fund to support human resource development. The obvious disadvantage of such a solution is that it would necessitate inter-governmental taxation agreements between the countries involved, unless a substantial tax was levied upon emigration (which most emigrants would most likely not be able to pay). A different approach under an inter-governmental agreement would entail the investment of a small portion of all remittances from the diaspora into research and development, while at the same time searching for

mechanisms to reduce transfer costs and providing favourable exchange rates (Saravia & Miranda, 2004).

Given that most of the above mitigation strategies have been devised by economists, it is not surprising that such strategies are aimed at macroeconomic interventions. Practitioners have proposed additional, more practice-oriented strategies. Nyongator and Dovlo (2005), for example, proposed the following strategies for the Ghanaian health sector:

- Increasing the supply of health professionals, for example through decentralization of the training of health workers to deprived regions and districts;
- Attracting and retaining health workers through attractive “fringe benefits” packages;
- Redesigning the remuneration system with innovative allowances and more flexible salary schemes;
- Improve and make transparent welfare and benefits schemes;
- Extending the working life of health professionals from 60 to 65 years;
- Recruiting older workforce entrants;
- Bonding and compulsory service periods;
- Extending managed exchange and return of migrants from existing schemes with other developing countries to higher-income recipient countries;
- Developing and integrating new mid-level cadres (for example, technicians) into the health workforce;
- Developing efficient human resources management and administration practices.

These recommendations are more promising in the short term than broad macroeconomic prescriptions since the former are based mostly on endogenous solutions to the issue of brain loss.

Brobbly and Ofosu-Barko (2002) also described a local program that uses a targeted approach to mitigate brain drain. The postgraduate medical program at the School of Medical Sciences at Kwame Nkrumah University of Science and Technology in Kumasi, Ghana, takes into account national and regional/local needs and demand for specialist care. It rests on the principles of problem-based learning, early clinical exposure, appropriate orientation to social needs, community-based/community-oriented education, and early community exposure and service. Although participants spent part of their time for clinical attachments in Europe and the U.S.A., all of the 25 participants that had completed the program at the time of the authors' writing had returned to finalize their degree in Ghana. The medical school at the University for Development Studies in Tamale, Ghana, also pursues an educational model that focuses on locally relevant skills and an orientation to community service (Dovlo, 2003). Dovlo argued that curricula need to be adjusted away from eurocentric methods of health education towards training about diseases and conditions found in West Africa, and the appropriate level of technology available there. The effectiveness of in-country training programs delivered in conjunction with institutions in higher-income countries and tailored to the needs and circumstances of lower-income countries warrants further attention as a potential strategy to deal with the brain drain problem.

There is a general recognition in the literature that the problem cannot be solved unilaterally, but that bilateral, regional and multilateral co-operation is needed (Chanda,

2002). Several authors have called for reciprocal, mutually beneficial links between lower- and higher-income countries, including temporary work exchanges, teaching, and collaborative research projects (Buchan & Sochalski, 2004; Chanda, 2002). Some such bilateral agreements are being tested, e.g., between the U.K. and South Africa: the two countries have an exchange program agreement that allows for health professionals from both countries to work for a limited period of time in the other country on a temporary visa or through exchange agreements (Nullis-Kapp, 2005; Stilwell et al., 2004).

In spite of the fact that the brain drain does not appear to be particularly well understood, a considerable body of literature exists that makes policy prescriptions to counter the brain drain phenomenon. The literature does not provide clear answers to the question of whether the brain drain is accompanied by a brain gain; that is, whether the loss of skilled labour from developing countries might result in certain economic and welfare gains for those countries. There appears to be a clear rift between theorists – mostly economists, on the one hand, and practitioners, on the other hand. Theorists seem more inclined to argue in favour of the co-existence of brain drain and brain gain conditions, whereas practitioners are more likely to dismiss such claims. Brain gain can be seen as either referring to the notion that expatriate professionals may be a potential asset instead of a definite loss through remote mobilization and harnessing of the expatriate's knowledge and networks for their home country's development (Meyer & Brown, 1999). Alternatively, brain gain is seen by some economists to result directly from increased investment in human capital formation through education in the source country if there is a probability of enhanced out-migration. Although the potential linkages between migration and the home country's development are increasingly cited in

the literature, Laczko (2005) highlighted the fact that the eight millennium development goals do not make any mention of migration. Migration management approaches still seem to be in their infancy as far as poverty reduction is concerned.

Suggestions on how to curb the brain drain fall into a number of broad categories. Some of the proposed measures pertain to policies to be implemented in recipient countries (e.g., codes of ethics that curb recruitment of skilled workers from developing countries), and some of them to policies to be implemented in source countries (e.g., taxation of emigrants). Some of the suggested policies necessitate close collaboration between source and recipient countries. Suggested policies are either punitive (e.g., taxation) or they are related to capacity-building and the provision of enabling environments (e.g., investing a small portion of remittances into R&D; enhancing the postsecondary education sector in order to attract more domestic students and to prevent them from draining to richer countries). A number of the suggested policies are problematic and could be seen as contradicting the individual's rights to freedom of movement. Likewise, such policies could be regarded as unfair treatment of immigrants from certain countries who would be subjected to punitive payments to which other immigrants (from higher-income countries) would not be subjected. One question is whether contextually adequate postsecondary education in the South is able to counter some of the adverse impacts of brain migration by providing development solutions, and this study attempts to provide some initial responses to this question, based on the interviewees' experiences.

**Links between Higher Education and Human, Social and Economic Development in the Majority World**

It has been 40 years since Charles Myers (cited in Grubel & Scott, 1977, p. 147) wrote his famous sentence that “the road to economic development is paved with universities”. Development at the national level is now widely regarded as a function of the effective use of human and material resources, with human resources being more important because the development process starts with people’s education, organization and discipline (Pandey, 2000). Globally, 50% of the students enrolled in higher education live in lower-income countries, and it is estimated that between 1991 and 2015, the number of students enrolled at the postsecondary level will rise by almost 50% (World Bank, as cited in Chapman & Austin, 2002). Some of this increase is the result of expanding participation rates at the primary and secondary level which has led to a significant rise in students graduating from high school and seeking access to postsecondary institutions (Chapman & Austin).

During colonial rule, universities were reserved for the well off. It was not until after World War II that most universities transformed themselves from elite institutions to more egalitarian institutions that felt responsibility for society’s needs (Powar, 2000). Yet, 60 years later, many countries in the South still have large populations living in poverty, and their educational institutions have not been able to address societal problems such as a high rate of unemployment among the educated; critical skills shortages; high levels of brain drain; underutilization of employed skills; and high rates of noncompletion (Gandhi, 2000).

The analysis of and theories about the particular linkages between development and tertiary education have for decades been dominated by economic considerations, with

little attention paid to alternative goals and motivations, such as social and cultural development (Little, 1999). I will discuss the current state of knowledge and the ongoing debate on the development-related benefits of tertiary education taking into account both economic and other perspectives.

As discussed earlier, “development” can be defined in many different ways. It is frequently understood and used in the context of the following definition by Portes (as cited in Rastogi, 2000):

National development can be defined as a complex of three main criteria:

- (1) Economically, sharp and sustained increases in national product; generation of centres of self-sustained growth. (2) Socially, redistribution of national income on an egalitarian basis; incorporation of marginal masses into the money economy.
- (3) Culturally, emergence of a new national self-image, confident of the future and willing to make sacrifices to bridge the gap with the developed world. (p. 198)

The economic dimension of development relates closely to human capital theory, the basics of which have been outlined earlier in this dissertation. Fundamentally, human capital theory conceives of education as an investment in people with certain expected outcomes in the form of wages or salaries (Lin, 1999). A standard definition for human capital, devised by the OECD in 1998 (as cited in Schuller, 2000), is: “the knowledge, skills, competences and other attributes embodied in individuals that are relevant to economic activity” (p.3). The difference between classical theories of capital, most prominently those formulated by Karl Marx in the 19th century, and neo-capitalist theories such as human capital theory, lies in the fact that, according to the latter, labourers can now acquire surplus value by trading their human capital (labour) in the

market (Lin). This is essentially how human capital theorists explain the migration of skilled labourers.

The social dimensions of development are closely related to the emerging concept of social capital. Lin (1999) synthesized the various scholarly interpretations of social capital as an “investment in social relations with expected returns ... [where] individuals engage in interactions and networking in order to produce profits” (pp. 30-31). Social capital thus focuses on the inherent value of humans and their interrelationships, rather than the economic purpose which these humans serve.

The two concepts of human capital and social capital form the backdrop for much of the literature on the links between education and development. Some foundational papers on the economics of human capital formation through education were written in the early 1960s. Although the concept of humans as capital is older and dates back to theories formulated in the 18th century, in particular by the philosopher-economist Adam Smith, it was not until some time during the last century that this idea started to be applied more directly to educational processes and the role of education in the development process of lower-income countries (Schultz, 1961). Schultz argued that the lack of human capabilities in these countries constituted a limiting factor to development because the low knowledge base within developing country populations prevented them from making use of the physical capital that started to flow to these countries. He blamed the “export of growth doctrines” (p. 16) of higher-income countries and argued that the focus on exporting nonhuman capital, assuming an abundance of human resources, had contributed significantly to stalling development in poorer countries.

Human capital theory is contrasted by the newer concept of social capital theory. Due to its recent emergence, there is no generally and broadly accepted definition of what social capital constitutes. There appears to be agreement, however, as to the role of education in increasing the stock of social capital, both at the level of individual and collective benefits (Kilpatrick, Field, & Falk, 2003). Some of the social capital theorists argue that the concept of human capital does not provide any solutions to pressing problems of development if it is not coupled with the notion of social capital, which stresses the importance of networks of knowledge and information-sharing, co-operation, and commitment to common objectives, thus furthering social cohesion (Schuller, 2000; Woolcock, 2001).

Human capital theory focuses on the economic behaviour of individuals and their acquisition of knowledge and expertise to increase their earnings potential, whereas social capital theory is occupied with the collective building of networks of knowledge and expertise (Schuller, 2000). According to Schuller, these two concepts ought not to be seen in isolation because only through the attention paid to the social relationships which enable the realization of human capital's potential could growth and development be achieved.

Measuring the quality of educational output and of returns on human capital is a difficult problem fraught with challenges and potential errors (Alexander, 2001; Pandey, 2000). Heyneman (as cited in Little, 1999) pointed out that the discipline of economics was not well suited to aid our understanding of the contributions to society made by education. Statistical techniques cannot easily be applied to measuring human resource development because human resources have both quantitative and qualitative dimensions.

A system evaluation of human resource potential for development would necessitate an instrument that could draw conclusions on the qualitative dimensions of human resource development. Social rate-of-return calculations have been used to estimate the contribution of education to society; however, such calculations tend to neglect all benefits and costs arising from externalities, e.g., the contribution of higher education to well-functioning institutions, social cohesion and good governance/citizenship, as well as the impact of a lack of higher education, e.g., famine, social breakdown (Alexander). In spite of these difficulties, some authors have tried such quantification of educational output, and their studies are discussed in the following sections.

The tertiary education/development nexus has both micro- and macro-level foundations (Lakshmanasamy, 2000): Although a micro-economic approach can be employed to address the issue from the perspective of human capital theory, there are also a number of macro-economic approaches to human capital and growth. In the micro-level view, individuals make rational choices about investments in education based on utility-maximizing behaviour. Many people in lower-income countries, however, do not have the possibility to make such choices, and the application of human capital theory to their situation is therefore inappropriate.

On the macro-economic side, neo-classical theories and the growth accounting framework both rest on the notion of total factor productivity where labour is combined with physical capital. Contrary to neo-classical theories, the growth accounting framework does not see labour productivity as static, but acknowledges the dynamic nature of labour input. Newer macro-economic models include the Endogenous Growth Model that looks at engines of growth from within, while trying to explain the diverging

living standards and growth rates across countries and over time (Lakshmanasamy, 2000; UNESCO Institute for Statistics [UNESCO Institute], 2003). According to Dessus (2001), one major flaw within the existing literature that claims a negative relationship between human capital formation and economic growth lies in the fact that those theorists neglect the existence of heterogeneous country conditions and educational systems. At the other end of the continuum, some theorists go as far as claiming that human capital and knowledge constitute an infinite engine of economic growth, to the effect that individual educational decisions result in a “self-amplifying virtuous cycle” (UNESCO Institute, 2003, p. 20). Some evidence of the existence of such a cycle can be found in the results of Schofer and Meyer’s (2005) study: They concluded that some of the indicators cited by McMahon (1999) to be the result of tertiary education (e.g., increased democratization) are equally important as determinants of tertiary education enrolments.

Richardson (2000) cited growth accounting estimates that claim only about 50% of developed countries’ growth can be explained by increases in the quantity of inputs, with the other half representing a rise in Total Factor Productivity (TFP) that can only be achieved through investments in human capital to improve the quality of labour, organization, and technological progress. Kirandeeep and Mwangi (2000) outlined the inherent tensions between this collective view of human capital or human resources, on the one hand, and a more individualistic or self-growth view of Human Resource Development (HRD), on the other hand. The economic model of development based on HRD has been criticized for its lack of consideration of egalitarianism, social equality and social justice (Kirandeeep & Mwangi), concepts more closely aligned with social capital theory.

McMahon (1999) contributed to the debate with econometric computations regarding the effect of investment in schooling on a number of nonmonetary variables: health (infant mortality, life expectancy, fertility rates, and net population growth); political (democratization, human rights, and political stability); poverty and inequality (rural poverty, urban poverty, and income inequality); environmental (deforestation, water pollution, and air pollution); and crime (homicides and other crimes). The UNESCO Institute (2003) equally stressed the contributions of education to social progress and societal well-being, in particular in the areas of democratic participation, social cohesion and poverty reduction, relief of demographic pressures, lower child mortality and improved family health, as well as participation patterns of women in the labour market. McMahon found that investment in schooling was positively correlated with these nonmonetary dimensions of development.

McMahon's (1999) regional analysis showed results for different levels of education. With respect to Latin America and the Caribbean, McMahon observed that "the slow-growing countries tend to be those that made the least effort in the prior decade to improve their human resource base through education" (p. 52). Just like in East Asia, he found that enrolment in tertiary education was not a significant determinant for growth rates in the short term, and had even a tentatively negative relation to investment in physical capital. Investment expenditure on secondary education is particularly important after the goal of universal primary education has been achieved.

In Africa, the same time-lagged positive impact of tertiary education could be observed (McMahon, 1999). Investments at primary and secondary levels again have important indirect structural effects on growth, with those effects largest for the poorest

countries. Female enrolment, for example, is highly significant for family planning, fertility rates and fighting the HIV/AIDS pandemic. McMahon concluded by cautioning that, although education was important, it was not the only source of growth, and its significance needed to be assessed against other growth indicators.

McMahon's (1999) findings substantiate the theories formulated over 40 years ago by economists like Charles Myers and Frederick Harbison who argued that investments in tertiary education might exceed a developing country's capacity relative to other levels of education and existing means of human resource development (Myers, 1967). Myers posited that a country's strategy for higher levels of education ought to depend on the existing level of human resource development and should take into account that human resource development is a system with many interdependent parts such as different levels of education (primary, secondary, postsecondary), training, incentives, and human resource mobility. Sutton (1967) followed up on Myers' argument with some stronger prescriptions for developing countries. He dismissed a correlation between early development of tertiary education and economic progress, and claimed that, historically, tertiary education had been a late feature of development in higher-income countries, rather than having been the root cause of these countries' development.

The UNESCO Institute (2003) elaborated further on the difficulties associated with quantitative measurements of the human capital/economic growth nexus. They contrasted studies from the 1960s that revealed a positive impact of human capital on growth, with later studies that used different econometric techniques and that found no statistically significant relationship between the evolution of human capital over time and economic growth. The UNESCO Institute also pointed to the significance of other factors in the

growth process, such as political stability, economic frameworks, and demography.

Based on a longitudinal study, the UNESCO Institute found a positive association between human capital availability and economic growth, with improvements in human capital accounting for about 0.5% of the annual growth rates of most lower-income countries in the study during the 1980s and 1990s. The UNESCO Institute concluded that “human capital may play a stronger role in the growth process once it reaches a threshold” (p. 32). Dessus (2001) confirmed the threshold theory: In his study, he also found a positive relationship between a country’s initial endowment in human capital, and the extent of productivity increases through additional educational attainments. According to the UNESCO Institute, that threshold seems to lie somewhere at the upper secondary or tertiary education level. Overall, the study by the UNESCO Institute found that “for every single year the average level of schooling of the adult population is raised there is a corresponding increase of 3.7% in the long term economic growth rate” (p. 32).

Barro (2000) included a gender component in his analysis of economic growth and investment. He found that, although growth was significantly related to years of school attainment at the secondary and higher levels for males, this relationship was insignificant for females. Barro interpreted this result to imply an underutilization of women in the labour markets of most countries.

A World Bank Task Force (World Bank, 2000) also allocated a prominent role to tertiary education and argued that both secondary and tertiary education had been neglected in the education debates of the last two or three decades that focused mainly on primary education. The Task Force described the view widely held in international donor organizations that investment in the tertiary sector brings meagre returns compared to

investment in other educational sectors as “narrow and ... misleading” (World Bank, 2000, p. 10). The Task Force claimed that economic arguments are based on a limited understanding of the societal contributions made by higher-level education institutions. Rate-of-return studies take into consideration only the graduates’ higher earnings and greater tax revenues. Rate-of return analyses neglect contributions such as graduates’ ability to become economic and social entrepreneurs; creation of an enabling environment for economic development, good governance and democratic values; a developed infrastructure; and the impact of university-based research on the economy (World Bank, 2000). The Task Force made a significant contribution by emphasizing the externalities of higher education that are not easily measured with economic and statistical instruments and thus brought higher education back towards the centre of the development debate.

The Task Force’s findings that emphasized the broader societal and emancipatory impacts arising from tertiary education have to be seen against the background of the World Bank being the biggest single external supporter of education in developing countries that has traditionally placed high priority on the primary sector (Alexander, 2001; UNESCO, 2004). Over the period 1992-94 to 2001-03, total World Bank education support declined from over US\$2 billion to just over US\$1.5 billion. At the same time, the allocation to tertiary education declined from 33% to 17.2% of total World Bank education spending, which is equivalent to an absolute decline from US\$694 million to US\$275 million spent on tertiary education (UNESCO, 2004).

It is politically convenient to allocate higher budgets to primary education because its cost is low relative to higher levels of education, and faster results can be achieved

more easily. However, this approach neglects the need to build on existing educational achievements at the lower stages in order to move educational development to a higher level. In the context of Ghana, Manuh, Asante, and Djangmah (2005) argued that

a zero-sum game has been played between basic and higher education. This persists at the same time as government is anxious to reduce poverty and achieve higher human resource development, all of which cannot occur without rapid developments in ICTs and higher education development. (p. 267)

At the beginning of the new millennium, the World Bank started to concede that tertiary education had potential for improving individuals' lives while at the same time enriching wider society (World Bank, 2000). More recently, the Bank has made active attempts to shed its image of promoting the reallocation of public funding from tertiary to basic education (World Bank, 2002). The World Bank's concern is linked to the emerging concept of a knowledge society that implies not just a society whose citizens are literate, computer-literate, or "educated" in a broader sense of the word, but a society whose citizens are capable of creative capacity, innovative thinking and the ability to make informed judgments regarding issues of relevance (Tilak, 2002).

Arguing against a narrow economic prescription of higher education as a tool to fill future human resource needs, Müller (2004) emphasized the ideological potential of education and education's role in fostering social solidarity and cohesiveness which, in turn, will benefit the greater societal good. These formulations are closely related to the concept of social capital.

The World Bank's recent shift towards according a more important role to higher levels of education also marks a shift in philosophy from a strict human capital paradigm

to a greater appreciation for some of the principles embedded in the social capital paradigm. The latest thinking by World Bank policy makers attributes four functions to tertiary education's role with regard to economic and social development: (1) improvement of the institutional regime through training of professionals for accountable and competent public sector management; (2) innovation through academic and research activities; (3) conduit and repository of a country's information infrastructure; and (4) foundation of a country's social capital through instilling in students the norms, values, attitudes and ethics necessary for building cohesive societies (World Bank, 2002).

The concept of social capital, however, poses a new set of challenges. Tikly (2004) described social capital "as the 'missing link' in development economics ... [which] has allowed economists associated with the World Bank to 'colonize' a sphere of social reality that was previously the domain of other disciplines" (p. 186). According to Tikly (2004), the term depoliticizes the situation in lower-income countries by removing any focus on socio-historic context and of underlying power relations. In this sense, social capital theory serves the same function as human capital theory.

Tertiary institutions and universities, in particular, fulfill other important roles in the context of development. The UNESCO (1998) accorded a vital role in this process to university-based research and community outreach that addresses societal needs with respect to cultural, social and economic development. The UNESCO (1998) argued that in developing countries in particular, university research ought to be dedicated to the search for answers to fundamental social and societal questions related to "the elimination of poverty, to sustainable development, to intercultural dialogue and to the shaping of a culture of peace" (p. 30). At the curricular level, the UNESCO (1998)

emphasized the importance of country-specific contextual materials that take into consideration the needs of communities in all parts of the world. Vocational and professional postgraduate education which successfully integrates professional and academic training, plays a particularly prominent role with respect to meeting a country's local needs and circumstances. The UNESCO (1998) also suggested that higher education institutions should pay special attention to instilling entrepreneurial skills into the students who will increasingly become not just job seekers, but rather job creators upon graduation.

Myers (1967) recommended very concrete strategies for countries at different levels of development. For the poorest countries, he suggested a focus on scientific and technical subjects, including medicine and agriculture, the enrolment of a large number of students in subprofessional and technician courses, extramural and extension programs, and the flow of university graduates into teaching, particularly at the secondary level. For countries that had already achieved higher income levels, Myers recommended increasing enrolments in agricultural, scientific, and engineering disciplines, as well as nursing and secondary teacher education. He also stressed the role of adult education and on-the-job training because people do not exclusively learn in university courses. Sutton (1967) reinforced this point and argued that developing countries needed to plan the extent of their higher education systems in accordance with foreseeable needs. He rejected the unregulated expansion of higher-level education because occupational opportunity for university graduates was generally limited in those countries. According to Sutton, lower-income countries required more people who could apply knowledge and

skills effectively in concrete circumstances, rather than people with high-order intellectual cognitive capacities.

In the last 40 years since Sutton formulated his theorizations, many shifts have taken place in the higher education sector throughout the lower-income part of the world. Horizontal institutional differentiation has taken place with the advent of private institutions and the expansion of online learning, whereas vertical differentiation has resulted in the creation of innovative and customized professional programs that are more responsive to country needs (World Bank, 2000). Contrary to Sutton, the World Bank saw a need for both “highly qualified specialists and increasingly flexible generalists” (p. 69). The Task Force called for more specialization amongst institutions to provide opportunities for in-depth study of particular fields that are pertinent to a country’s development context, while promoting the pertinence of a general or liberal education as a means of preparing students for flexible, knowledge-based careers that demand of them the ability to manage large quantities of information and adapt to rapidly changing environments. In the context of lower-income countries, general or liberal education is not necessarily identical to the Western understanding of this term (due to its colonial connotations, it is sometimes perceived as negative in formerly colonized countries). Rather, the term refers to a country-specific set of educational outcomes that address the whole human being through promoting “responsible citizenship, ethical behaviour, educational ambition, professional development in a broad range of fields, ... broad-mindedness, critical thinking, and communication skills” (World Bank, 2000, p. 88). As such, general or liberal education has the ability to aid the development process through complementing more specialized educational careers.

Social capital adds to and challenges this debate through the realization that “human capital is not built within formal educational institutions and frameworks alone, or even predominantly” (Schuller, 2000, p. 24). However, rather than calling for a narrow alignment between education and a society’s specific human resource needs, social capital theory emphasizes values and competences that are learnt during practical applications, thus stressing a broad concept of learning through participation in different social and economic spheres (Schuller).

Several authors argue for improved relations between universities and industry (Gandhi, 2000; Kothari & Patil, 2000; World Bank, 2000). Because many of the challenges facing lower-income countries are technological in nature, research-industry partnerships could hold the key to better technological development. Industry partners have to be carefully selected: In the context of India, as in many other lower-income countries, small-scale industries and farmers are good university partners because they lack contacts or resources for importing technology and thus rely to a much greater extent on domestic solutions, elaborated in conjunction with university researchers (Kothari & Patil). However, caution needs to be exercised with respect to university-industry partnerships which can easily lead to the establishment of private institutions within a neo-liberal framework, thus reducing public funding dependence at the expense of socio-economically disadvantaged students for the benefit of companies and individuals in the upper echelons of society (Bernasconi, 2005).

Due to access limitations and the frequently poor quality of tertiary education in lower-income countries, large numbers of students from those countries study in wealthier countries in Western Europe, North America, Australia, and New Zealand. It is

frequently argued that these students, upon return, will be able to make a contribution to their home countries' economic and social development. Some of the problems associated with students from poorer countries studying in higher-income countries have already been discussed in the previous section on the brain drain. In addition, Weiler (1984) saw the training of academics and professionals from lower-income countries in higher-income countries as a vicious cycle of perpetuating existing problems of social equality because these graduates will become members of a persistent upper class in their respective countries. In spite of these problems, Samoff and Carrol (2003) maintained that limiting overseas study or work would have negative consequences and would alienate those who are in a position to make choices about where to live. These authors argued that regulations forcing students from lower income-countries to return home after studying overseas had been unsuccessful, and that the solution was to be found in increasing the attractiveness of opportunities at home, thus encouraging voluntary return.

The above discussion leaves us with a number of conundrums. Obviously, one major dimension of the debate evolves around the narrow view of development as economic development and human capital growth for economic productivity, whereas the broader view of development looks at the dimensions of human, social, cultural, and economic development. The World Bank (2000) synthesized its findings derived from statistical analyses, case studies, and common observations along four major dimensions of the higher education-development nexus:

- Income growth (creation of public goods such as new knowledge that contribute to enhanced labour productivity, entrepreneurial energy, and enhanced quality of life);

- Enlightened leaders (cadres of teachers for all educational levels; graduates who can confront society's economic and political realities);
- Expanding choices (enhance social mobility through offering a wide range of specialized and general topics to study);
- Increasingly relevant skills (motivate scientists to define and address local problems and find solutions that are appropriate to the context).

These dimensions obviously pertain to the broader view of development which is increasingly gaining currency in a complex globalized world where a country's socio-economic environments can no longer easily be reduced to neo-liberal notions of factor productivity.

Another conundrum relates to the perceived dichotomy between individual goals of tertiary education (personal ambitions, careers) and collective goals (societal betterment). The question must be asked as to whether individuals should be and how they could be enticed to not only consider personal advancement in pursuing tertiary education goals, but to do so with a consideration for the development of the societies in which they live.

Müller (2004) described the conflict between a social-demand approach and a manpower-demand approach to development, with the latter exemplified by human capital theory. The author posited that a focus on creating human capital might weaken social solidarity and thus might undermine achieving the very goal it was set out to achieve. This argument links back to the earlier discussion of human capital and social capital, and the question as to whether these are two mutually exclusive concepts, or whether they can coexist and maybe even mutually enforce each other for the purpose of societal development.

Related to the debate around human capital and social capital is the type of education that fosters either of these concepts. The literature juxtaposes a view of education serving an economically and socially productive endeavour (broadly related to the concept of human capital formation) with a view of education serving a broader purpose of social cohesion, equality, and supporting liberal values (broadly related to the concept of social capital formation, and frequently termed “socially unproductive activities” by its opponents).

One fundamental flaw in this debate is the measuring of development-related variables and their relationship with tertiary education within a eurocentric framework against some blueprint provided by the First World. All perceived progress or lack thereof is measured along the trajectory that applied to the development of educational institutions and, in particular, the tertiary sector, in a different geographic, historical, cultural and political context. Such development in the European context occurred over centuries, whereas it is supposed to take place over a much shorter period of time in postcolonial societies. European institutions grew slowly and organically from within, in step with the changes occurring in society, and with little outside involvement. It is likely that African education systems, in particular at higher levels, could also develop in closer alignment with societal development if there was less outside interference. Pertinent to the discussion of indigenous education systems are South-South models of assistance which I will discuss in the next section, as well as the larger theme of postcolonialism and the colonial legacy, which will be the subject of the last section in this chapter.

### **How the South Can Learn from the South**

The concept of South-South co-operation for development arose out of the existence of a considerable gap between industrialized countries and lower-income countries in areas such as production and utilization of scientific and technological knowledge (Hassan, 2000), and the assumption that the key to finding solutions to the critical problems persisting in poorer regions of the world might lie within these regions themselves. When dependency theory took shape in the 1960s it led to lower-income countries seeking ways to gain more autonomy from the former colonial powers. The Group of 77 (G-77) formed in June 1964 at the initiative of 77 developing countries that were signatories of the Joint Declaration of the Seventy-Seven Countries, issued during the first session of the United Nations Conference on Trade and Development (UNCTAD) in Geneva (Group of 77, n.d.). The Group's primary objective is to provide "the means for the developing world to articulate and promote its collective economic interests and enhance its joint negotiating capacity on all major international economic issues in the United Nations system, and promote economic and technical cooperation among developing countries (ECDC/TCDC)" (Group of 77, n.d., ¶2). Since its inception, the Group of 77 has released 16 joint declarations, action programs and agreements on specific topics.

The G-77 documents and a number of other subsequent formal agreements aided the process of mainstreaming South-South co-operation into some of the main donor agencies' operations. In 1974, the General Assembly of the United Nations Development Programme (UNDP) created a special unit within UNDP to promote technical co-operation among developing countries (UNDP, n.d. c). Resolution # 3251 (XXIX) outlined that the unit was created "with the objective of integrating this activity of

technical co-operation among developing countries fully within the Programme” (UNDP, 1974, ¶8). The late 1970s saw the signing of the Buenos Aires Plan of Action (BAPA) by 138 countries, which outlined the expansion of trade and of other forms of collaboration within the South (Abdenur, 2002).

Just a few years later, the Organization of American States (OAS) established a horizontal co-operation program between developing countries, rapidly followed by a number of other initiatives and programs (Abdenur, 2002). In 2000 the Group of 77 plus China met in Havana, Cuba, during a South Summit. They issued a wide-ranging declaration that consisted mostly of appeals to governments of industrialized nations and to the international donor community to create the necessary external conditions to facilitate development in the Group of 77 nations. The document also explicitly outlined the importance of South-South co-operation as an effective instrument to mobilize and share existing resources and expertise within the Group, as well as to complement programs with donor countries from the North (Group of 77, 2000).

The Group of 77 declaration recognized regional co-operation and integration through harmonization of economic and social policies as the most meaningful approach for South-South co-operation. Although the membership in the Group currently stands at 132, it has retained its original name due to its historic significance (Group of 77, n.d.). In 2003, the name of the UN special unit was changed to the Special Unit for South-South Cooperation (UN Information Service, 2003), and the importance of South-South co-operation as a complementary strategy to North-South co-operation was reiterated, in particular in light of the Millennium Development Goals. One of the more recent major initiatives in horizontal co-operation is the New Partnership for Africa’s Development

(NEPAD) which rests on the principle of finding African solutions to African problems (Hammett, 2004). Although only formally adopted as a strategic framework by the Organisation of African Unity (OAU) in 2001 (New Partnership for Africa's Development [NEPAD], 2006), its founding principles replicate many of the previous principles of South-South collaboration as enshrined in various documents.

Much of the literature on South-South co-operation focuses on trade or industrial operations. However, Mytelka (1994) argued that South-South co-operation was a much bigger concept that deserved attention because of the increasing role of other components such as innovation and knowledge intensity for the development process. The dearth of literature on the adoption of education models as a form of South-South co-operation is also surprising in light of Abdenur's (2002) assertion that this is "one of the core areas of cooperation among developing countries" (p. 58).

In spite of the mainstreaming efforts of South-South co-operation over the past two decades, Ekoko and Benn (2002) maintained that both economic and technical cooperation among developing countries (ECDC and TCDC) had remained much on the margins of traditional international development co-operation. The origins of South-South co-operation through the TCDC paradigm were political. As the 1980s saw a rapid increase in globalization and trade liberalization trends, TCDC moved away from its political discourse to serve more economic imperatives. In the 1990s, TCDC thus became integrated with ECDC to approach South-South co-operation through a broader framework (Ekoko & Benn). Current theories of capacity building in the South that focus on higher levels of skill formation and increased levels of technology in the production

sector are largely linked to TCDC, whereas theories of development through trade liberalization schemes are linked to ECDC.

A report issued on the occasion of United Nations Day for South-South Cooperation in 2004 has provided some useful definitions of these basic concepts (UNDP, 2004, p. 4):

Technical Cooperation among Developing Countries (TCDC): Focuses on building technical capacity by way of training, exchanging experts, and sharing experience and know-how.

Economic Cooperation among Developing Countries (ECDC): Focuses mainly on trade and technology flows among developing countries. It addresses the need to change discriminatory elements of global institutional and regulatory frameworks.

South-South Co-operation: The phrase gained currency in the context of efforts by developing countries in the 1970s to negotiate agreements that would help close the widening economic gaps between them and the developed countries (the North). In 2003, the General Assembly formally opted to use “South-South” instead of “TCDC” in dealing with co-operation among developing countries.

Triangular Co-operation: The term refers to South-South collaboration supported by partners in the North.

In the UN framework, the conceptualization of development has changed over recent decades. Formerly perceived as raising science and technology (S&T) capacity as well as the gross national product (GNP), “it is now envisaged as an enriching economic and social transformation centred on human well-being” (UNDP, 2004, p. 13). Ekoko and Benn (2002) brought the important aspect of relevance into the equation: Their definition

of South-South co-operation takes into account “the need to harness the capacities of the developing countries, particularly the more developed among them, to transfer to other developing countries their expertise and experiences that may be more relevant to Southern needs and circumstances” (p. 122).

Using terminology like “North” and “South” includes the inherent danger of lumping together hugely dissimilar countries that might have little in common with each others. Hassan (2000) warned that “any strategy to promote South-South collaboration must bear in mind the diversity of countries in the South” (p. 33). Okpaku Sr. (2000) noted that terms like the “First South” and the “Second South” had been used in order to describe those countries on top of the human development path and those at the bottom, respectively. He saw the North-South conundrum in terms of the aspirations of many lower-income countries to “move North”, which raises the question as to what genuine South-South co-operation can mean if the primary objective of Southern countries is to turn into a Northern “clone”.

Another way to conceptualize Okpaku Sr.’s (2000) argument is through thinking of countries arranged along a continuum of “South” and “North” rather than seeing these concepts in binary terms, with “South” standing for low per-capita income, low levels of technology and productivity, and a low ranking on the human development index, whereas “North” stands for high per-capita income, high levels of technology and productivity, and a high ranking on the human development index. Okpaku Sr. pointed to the identification, qualification and quantification of existing scientific expertise in the South as a key priority in building a framework for South-South co-operation. This stance was supported by Hassan (2000) who argued that South-South co-operation strategies

would be most beneficial if they were associated with the best science available in the South and the region's most outstanding institutions and programs.

Some literature on South-South collaboration focuses on discussions around free trade in the context of various regional free or preferential trade frameworks, for example the Common Market of the Southern Cone - MERCOSUR (Argentina, Brazil, Paraguay, Uruguay, with Bolivia and Chile as associate members); the Southern African Customs Union – SACU; or the Free Trade Agreement (FTA) that links MERCOSUR and SACU (Ary Plonski, 2000; White, 2004). White questioned the effectiveness of FTAs in the context of attempts to improve South Atlantic relations and called for smaller industries and improvement in areas of industrial and sectoral co-operation, as well as increased inputs into multilateral fora. The process of negotiating regional FTAs is highly politicized because it interacts and sometimes interferes with the negotiation of larger supra-regional FTAs. Because the U.S.A. has dominated trade liberalization efforts globally since the end of World War II, it is not surprising that the U.S.A. is reluctant to see regional trade agreements as anything other than “stepping stones to global liberalization” (Weintraub, 2000, p. 43).

In assessing the viability of the South-South FTA between MERCOSUR and SACU, White (2004) noted some of the same criticisms that have been raised against North-South free trade agreements. He argued that complementary trade transfers are limited because the products produced in the two regions are largely identical, and SACU as the weaker partner could find MERCOSUR producers dump their cheaper products in the Southern African markets. White has advocated for less high-profile, but more effective trade agreements that target smaller and more complementary industries. In this

context, Ross and Chan (2002) raised the worrisome perspective that countries in the South, rather than collaborating in order to strengthen their position vis-à-vis the North, might engage in a “race to the bottom in wages and labor conditions” (p. 71). Although the United Nations Office of the Special Adviser on Africa ([United Nations], 2004) did not seem to see the emerging agreement between MERCOSUR and SACU in the same negative terms as White, they also pointed to bilateral trade agreements as another and more direct way of strengthening South-South ties.

Mytelka (1994) further contributed to the debate by criticizing traditional trade schemes as a mechanism for South-South development. She claimed that trade regimes implemented in developing countries over the past decades had resulted in declining terms of trade for commodity exports, and structural adjustment programs in particular had reduced intraregional trade amongst many Southern countries. Mytelka argued for a new approach to South-South co-operation away from regional trade as a simple mechanism to overcome the limited opportunities in small domestic markets, towards a more dynamic and innovation-driven approach where knowledge and networking serve to create a circle of learning and technological change. Strengthening human resources becomes essential in this innovation-driven model.

A certain level of South-South co-operation in the industrial and utility sectors already exists outside the large-scale trade schemes. In its report on South-South co-operation in the context of the New Partnership for Africa’s Development (NEPAD), the United Nations (2004) noted how Latin American and African countries had worked together through multilateral and bilateral channels to enhance expertise in the energy and information sectors, and in the communication technologies (ICT) sector. One very

concrete example of such locally relevant co-operation is the development of intermediate technologies by Latin American countries for use in African countries. Such technologies are better adapted to African needs than the sophisticated products imported from industrialized countries. Another example is the allocation of maintenance and renovation work contracts for the telephone network of Lagos, Nigeria, to a Brazilian company in the early 1980s (United Nations, 2004). These types of collaboration use a more micro-level approach to South-South relationships that can build capacity and knowledge in lower-income countries.

The comparative education literature dealing with South-South collaborations is scarce: A review of 472 articles published in the journal *Comparative Education* between 1977 and 1998 uncovered only 12 articles (2.5%) that dealt with South-South themes (Little, 2000). Abdenur (2002) provided a literature review of approaches taken to South-South education transfer from a comparative education perspective. She contrasted authors like Altbach, who argue that lower-income countries have not yet engaged in significant collaborations for intellectual transfer, with others, notably Arnove, and King and Buchert, who recognize that such transfer has taken place. Abdenur maintained that a much richer body of literature on South-South collaboration exists by scholars of international relations and development experts. She accorded a key role to education in co-operation between lower-income countries and argued that a sizeable portion of all South-South co-operation takes place in the field of technical assistance and education projects. Abdenur saw South-South co-operation as being closely tied to the role of knowledge as a development tool.

This claim is apparently substantiated by the experience of former developing countries that have achieved significant progress over the last few decades. South Korea and Taiwan, for example, have made notable investments in human resource development and show participation levels in education close to those of industrialized countries (Perez, 1994). Perez attributed an essential and strategic role in the development process to education, and he argued that governments ought to play a key steering role in enabling and financing South-South collaboration models in education and training. This view is supported by the UNDP (2004) which recognized educational activities such as India's bilateral program of co-operation with other developing countries for educational scholarships and training programs as core initiatives in highlighting the programs of "pivotal" countries.

Measured in terms of scientific publications, Hassan (2000) reported that a staggering 90% of the world's current scientific knowledge originated in the North, a region that comprises only 20% of the world's population, whereas the South that hosts the remaining 80% of the population contributed only 10% of scientific knowledge. He called for better utilization of institutions of excellence in the South and beckoned governments in the South as well as international donor agencies to sponsor scholarships for students to pursue advanced level studies in order to build up scientific expertise. At the same time, Hassan emphasized the need for South-South research collaborations to address the real-life problems faced by many countries in the South. In this context, Mytelka and Ohiorhenuan (2000) bemoaned the fact that the South was frequently portrayed as a "technology-deficient zone" (p. 74) in the current literature. They pointed

to the indigenous knowledge that exists in those countries and that has the ability to make significant contributions to sustainable and locally adapted development.

The Southern African Development Community (SADC) has been trying to build linkages with other countries on the African continent in the area of science and technology (S&T). Regional Co-operation is promoted through the *Protocol on Education and Training in the SADC* which contains provisions for higher education and research and development (R&D) resource sharing, and calls for the mobility of researchers through relaxation of immigration regulations (Kahn, 2001). The Protocol also allows for students from other SADC countries to obtain bursaries under grants awarded by the National Research Foundation (NRF). Other education and knowledge related networks include a network on Local Government Training in Asia and the Pacific (LOGOTRI), based in Nepal and established under the auspices of the UN; the University of the Indian Ocean program on higher learning within the region; and the Latin American Information Technology Network (Ekoko & Benn, 2002). Ary Plonski (2000) cautioned that there was an inherent tension in South-South co-operation in the S&T sector: As mentioned previously, not all countries are equal, and the need to work on the frontiers of knowledge might clash with the realities and social needs of surrounding societies.

Due to their colonial histories, countries in the South are still heavily influenced by education systems in industrialized countries. Based on a case study carried out in South Africa and Madagascar, Wolhuter, Steyn and Steyn (2003) contended that South-South educational co-operation had the capacity to better meet the educational needs of learners in Southern communities with similar structural, economic and demographic

characteristics. Their study revealed that both countries had failed to provide learners with competences that matched their societies' educational needs; rather, in both cases the educational systems educated for learning outcomes more in line with those needed in the higher-income part of the world and which were far removed from the learners' daily realities. These conclusions are supported by the World Declaration on Higher Education, formulated by UNESCO and its partner institutions at the 1998 World Conference on Higher Education in Paris (UNESCO, 1998). The authors of the Declaration emphasized that higher education ought to be based on long-term societal aims and needs in order to be relevant and to achieve endogenous capacity-building. Integration in higher education was seen as a vehicle for political and economic integration.

Educational co-operation between African and Latin American countries has been operating for decades. The main Latin American countries involved in the provision of educational assistance to Africa have been Brazil, Cuba and Mexico. Through scholarship programs, training of African students both in Latin America and in Africa, as well as capacity-building programs and the establishment of educational institutions in African countries, these three Latin American countries have made a sizeable effort to build up human capacity on the African continent (United Nations, 2004).

Hickling-Hudson (2000b) suggested that Cuba and its neighbouring countries in the Caribbean could co-operate for mutual gains. Cuba has excessive university capacity, but lacks economic experience and connections to take advantage of emerging opportunities in the globalized economy. Many countries in the Caribbean, on the other hand, have significant natural resources and economic expertise in a variety of sectors, but suffer

from gaps in their postsecondary education systems that cannot be filled without external help.

At the same time that Cuba is training scholarship recipients through its tertiary institutions, the country is also providing horizontal collaborative assistance through sending professionals – primarily teachers, physicians and agriculturalists - to other countries. The size of this assistance program is impressive: Between 1973 and 1985, Cuba sent 22,000 teachers abroad to work in other lower-income countries for a few years (Hickling-Hudson, 2004a). Arrangements for this type of collaboration range from free educational assistance provided to very poor countries, to cost-sharing agreements with slightly higher-income countries. Cuban teachers earn an additional salary from the host country, a portion of which is returned to the Cuban government. Cuban professionals overseas are utilized in different ways: Jamaica uses Cuban teachers primarily to fill shortages in its K-12 system, whereas Namibia also uses the Cubans for larger capacity building efforts within the Namibian education system (Hickling-Hudson, 2004a). The Cubans gain from this South-South arrangement as well: The professionals obtain valuable work experience in different and often challenging settings, while at the same time alleviating the pressure on Cuba's economy which has not been able to provide enough employment for the large number of graduates (Hickling-Hudson, 2004a).

The Cuban example raises an important question about South-South development: To which extent are win-win relationships really feasible among low-income countries that inevitably have to make sacrifices in providing aid to each others? Hammett (2004) maintained that, in the case of Cuba, the country's assistance program clearly creates a

win-win scenario in that Cuba benefits economically and politically from its internationalist interventions. The exporting of human resources has contributed to earning Cuba some much-needed hard currency. Apart from Cuba's practice - started in the late 1970s - of charging recipient states variable rates, based on the latter's ability to pay for services rendered, construction projects in Libya and Angola in 1979, for example, earned Cuba 18% of its foreign exchange trade during that year (Eckstein, as cited in Hammett).

South-South co-operation can be observed to varying degrees in a variety of other sectors. Many lower-income countries have devised bilateral and multilateral mechanisms for mutual assistance. Again, Brazil, Cuba and Mexico have made considerable contributions to strengthening human resources in the health sector and have designed programs combating major health problems and pandemics in Africa, such as HIV/AIDS (UNDP, 2004; United Nations, 2004). Similar to its educational assistance programs, Cuba has sent medical and auxiliary personnel to a large number of African countries. Brazil, Cuba and Mexico have all provided training for African medical professionals and technicians, either in those persons' respective home countries, or in the host countries in Latin America (United Nations, 2004). The Cuban medical assistance program, in particular, is seen as an excellent fit with the objectives of NEPAD for South-South co-operation (Hammett, 2004; United Nations, 2004). Furthermore, the Cuba - South Africa program has sparked "spin-off" programs in the health sector, such as a program now running in Mali and funded by South Africa in conjunction with Cuba and Nigeria (Hammett).

The scope of Cuba's assistance to South Africa in the health sector has been impressive. Hammett (2004) outlined that in 2000 there were over 75,000 Cuban volunteers and 40,000 graduates from Cuban universities working in Africa. Cuba's total development assistance during the period 1963 to 1989 amounted to approximately 0.7% of the country's GDP for that period, a figure that equals the UN target for development aid, but that has so far not been reached by most industrialized countries (Hammett). In his in-depth study of co-operation between Cuba and South Africa, Hammett argued that South Africa, recipient of Cuban medical assistance, was motivated to enter into agreements with Cuba due to a history of Cuban support for the African National Congress, as well as "the common perception among developing countries that Cuban aid is not tied to imperialistic ambitions. In keeping with the principles of NEPAD, Cuban involvement is viewed as self-help development, free from dependency" (Grabendorff, as cited in Hammett, p. 23). Hammett argued that the program was designed so that it would not create a long-term dependency by South Africa on Cuban doctors: The overall scheme also contains provisions for South African doctors to be trained in Cuba in order to build the former's capacity and thus work towards long-term sustainability of the South African health care system.

There are also much more tangible benefits to the Cuba-South Africa collaboration. Similar to the situation in the education sector, Cuba is among very few countries globally with an oversupply of doctors, and South Africa is in urgent need of medical staff (Hammett, 2004). Economic benefits in this context arise from the 37% tax on the Cubans' wages which is paid to the Cuban government, and from Cuba's prospect of entering the generic drugs market. On an individual level, doctors gain not only

experience, but also an economic advantage due to the income differential between the two countries.

Peace and security is another area in which lower-income countries have collaborated through a variety of mechanisms. Brazil and South Africa, for example, have worked through the United Nations to be shortlisted as potential candidates for membership in the UN Security Council (White, 2004). A naval agreement across the Atlantic called Atlasur links Argentina, Brazil, Uruguay and South Africa, and offers opportunities for co-ordinated naval operations, as well as exchange of information and technology. Another agreement between 24 member countries along the Atlantic Ocean established a Zone of Peace and Cooperation of the South Atlantic (ZPCSA) that was adopted by the UN-sponsored Commission on Narcotic Drugs in 1997 (United Nations, 2004; White, 2004). These larger-scale agreements are complemented by bilateral arrangements between Brazil, Mexico and a number of African countries emerging from conflict, in particular through the creation of employment opportunities for ex-combatants, the establishment of vocational training centres, and the facilitation of the former combatants' integration into civil life (United Nations, 2004).

The United Nations system, in particular, has facilitated the establishment of numerous other multilateral agreements and networks across a wide range of areas, including, for example, food security; animal and plant pests and diseases; agriculture and environment; entrepreneurship and development of small and medium-size enterprises; and population and reproductive health (Ekoko & Benn, 2002). Agriculture in particular represents an important sector of collaboration between Latin America and Africa due to the similarities in the two regions' climate and natural environments.

Raising agricultural productivity is key to Africa's development, and imported agricultural technologies that were developed for large-scale farming in the North have often done more harm than good. Successful South-South projects and networks include a number of bilateral agreements under which Latin American countries work with African partners to strengthen agricultural research institutes, to support subsistence farming as a development strategy, and to transfer locally-appropriate technologies and technical knowledge in agriculture (United Nations, 2004).

Micro-level initiatives, although limited in scope, can also play a role in South-South collaboration. The example of a South-South exchange during which Mozambican adult educators visited colleagues in Nicaragua, Brazil, Guinea-Bissau and Portugal shows how small-scale initiatives can have a lasting impact on the originating country through the multiplication effect thus generated (Marshall, 1990).

Triangular co-operation is a recurring theme in the literature (Ary Plonski, 2000; Ekoko & Benn, 2002; Mytelka, 1994; UNDP, 2004). This concept involves several dimensions of co-operation flowing not only from South to South, but also via the more traditional route from North to South. Mytelka (1994) maintained that successful South-South collaboration required the strengthening of North-South ties because the initial transfer of technology in that direction created externalities that enhanced South-South co-operation. The argument was made even more strongly by Thomas (2000) who posited that "South-South cooperative arrangements would have to be explicitly designed to complement existing and future North-South relations, in a positive sum model of international relations" (p. 54). Thomas's argument, in particular, is reminiscent of the imposing of conditions on Southern partners that would benefit the richer Northern

nations, much like the structural adjustment policies prescribed by the international financial institutions as a prerequisite for loans to the South.

These assertions raise the question as to whether such a model would not simply perpetuate the existing relationships of dependency that have characterized North-South relations during much of the postcolonial period. The UNDP (2004) has cautioned that triangular co-operation might be most successful if it supports regional centres of excellence and knowledge networks in the South. This conflicts with Thomas's (2000) view that the external environment is not conducive to the establishment of South-South linkages that leave out Northern partners, and his apparent suggestion that countries of the South do not have the capacity to effectively collaborate amongst themselves.

Contrary to Thomas, Abdenur (2002) regarded the North-South axis as largely fictional and claimed that there was a sizeable network of international educational exchange between Southern partners that was not readily explained by North-South patterns. Ekoko and Benn (2002) added that seeking capacity transfer from high-capacity countries in the South to others that had less capacity would also lead to significant savings because TCDC experts cost only about one third of experts from countries in the North.

Some of the individual experiences discussed here appear to indicate that South-South collaboration can provide a feasible model for development co-operation. It has to be kept in mind, however, that some models, in particular the large Cuban South-South assistance scheme, represents a somewhat isolated case that is based on a complex mix of historical, political, and economic factors, and which might not be replicable in other contexts.

One of the major points of contention is the extent to which South-South collaborations should be designed as an alternative to more traditional North-South development models, or whether these horizontal linkages need to be closely integrated with North-South frameworks. As the discussion of triangular co-operation shows, the question of whether there is a role for industrialized countries in South-South collaborations warrants consideration. Involvement of industrialized countries could be conceived of along a continuum, ranging from simply providing financial assistance to the South-South linkages without any active interference in the horizontal relationship, all the way to a fully-fledged triangular relationship where the industrialized country would act as a full partner of the countries involved in the South-South linkage with a considerable degree of influence over the design of programs.

Any consideration of South-South linkages for development inevitably raises questions around what type of development is desirable and towards what goals countries might aim to develop. It is no longer appropriate to think about development models widely espoused in today's industrialized countries as the only appropriate development paradigms. The widespread failure of structural adjustment policies as a means of alleviating poverty and of contributing to development in lower-income countries proves that policies rooted in Northern default thinking patterns will not necessarily achieve the desired results in environments characterized by very different socio-economic realities. Very specific and localized bilateral collaboration mechanisms such as the assistance program in the health care sector between Cuba and South Africa, or the Cuban tertiary education scholarship program operating with a large number of recipient countries, appear to be more promising. These initiatives are designed for the mutual benefit of the

collaborating partners through addressing particular gaps in the respective countries' economic and/or social systems. An in-depth study of the broad impact of the Cuban tertiary education scholarship program on both Cuba and one or several of the recipient countries, similar to Hammett's study in the health sector, could shed some light on the success of this program not just at the individual level, but also for the donor and recipient countries at large.

### **The Colonial Legacy and its Impact on Education in the Former Colonies**

European colonialism in the latter part of the 19th and during the first half of the 20th century has had a profound impact on the social, political and economic world order both then and now. Most former colonies achieved independence more than 30 years ago. The Cold War came to an end in 1990, and it could be argued that traditional neo-colonialism has disappeared as a result of these developments. However, Gopinathan and Altbach (2005) maintained that there are continued efforts by Western countries to exert influence over lower-income countries and to profit from their educational systems as conditions of globalization and the prevailing neoliberal agenda enable neo-colonial relationships to persist. According to Weiler (1984)

... one of the most critical aspects of underdevelopment, [is] that underdeveloped countries are dependent not only on the mechanisms of economic control that are built into the international system by the countries at the system's center but also – albeit in more subtle ways – on models of cultural, scientific, and professional activity that have been generated and sustained by systems of knowledge production and higher education in the center countries. (p. 173)

The collective experience of colonial domination has created a particular urgency on the African continent towards decolonization in all spheres of life. Decolonization includes “psychological rehabilitation, cultural affirmation, economic emancipation and intellectual independence ... it would appear that a significant number of Africans still derive their intellectual inspirations and validation from people other than themselves” (Makgoba & Seepe, 2004, p. 29). Postcolonial theory builds on the ongoing interrogation of European imperialism pushing into practically all continents, following the formal end of colonialism which, according to Crossley and Tikly (2004), was a violent event that preceded globalization and global capitalism.

The postcolonial period has presented postsecondary educational institutions in former colonies with a new fundamental challenge: whether to continue pursuing the metropolitan legacy of intellectual refinement that was often unresponsive to societal realities, or to adopt a new radical vision of rejecting colonial intellectualism and implementing a model of higher education better aligned with the respective country's context (Nkulu, 2005). At the end of the colonial period, education was seen as a powerful engine to achieve social and political goals in the newly independent countries. As Assié-Lumumba (2000) puts it, the “general atmosphere [was] characterized by a euphoria, faith, and confidence in education as the ‘great equalizer’, a means for individual development and upward mobility, and an effective instrument for achieving national economic development” (p. 90). However, the early progress in the educational sector could not be sustained due to deteriorating economic conditions and outside pressure (Assié-Lumumba; Samoff & Carrol, 2003). Also, Abdi (2003) questioned the extent to which an educational system that operated for a long time to subjugate people

would all of a sudden enable these same people to achieve a level of conscientization that would allow them to define their problems and to realize their potential. As African economies relied more and more on loans from the international financial institutions (World Bank and International Monetary Fund), their budgets became subject to external control, with detrimental impacts for social programs and the state's ability to fund education (Assié-Lumumba). Nevertheless, the idea of tertiary education's role for the development of newly independent countries also found international support by bilateral, and philanthropic organizations through aid programs, in particular in the Eastern Bloc, and Communist countries such as China and the Soviet Union supported the development process through scholarship programs (Samoff & Carrol, 2003).

There exists a close link between colonialism/postcolonialism and the development discourse (Ntarangwi, 2003; Tikly, 2004). Ntarangwi argued effectively that many societies were self-sufficient when the colonizers arrived and were systematically led into dependency through the colonizers' attempts at "developing" their "subjects".

Globalization movements have posed new challenges to postcolonial societies over the last few decades. Tightening systems of global economic regulation have negatively impacted postcolonial education systems. Educational globalization first came about as a result of European colonialism with the spread of a common structure of schooling and curricula based in the Graeco-Roman tradition (Tikly, 2001). Colonial education was selective and elitist in its offerings of secondary and tertiary education opportunities and thus contributed to the formation of local elites that became part of the global elites. At the same time, colonial higher education also formed the intellectuals and revolutionaries who fought for national liberation from colonial rule (Tikly, 2001).

As I have already alluded to previously, the donor institutions providing development assistance have always sought to promote their own national interests: In the days of the Cold War, the U.S.A. had a vested interest in cultivating ties abroad in support of the Western bloc, and education played an important ideological role in this context (Denning, 2005; Samoff & Carrol, 2003). Scholarship programs were set up for African students which aimed at shaping the thinking of Africans along anti-Communist lines, while the U.S. government supported the establishment of African universities modeled on U.S. institutions (Samoff & Carrol). The Soviet Union had the same interest in shaping the ideological orientation of Africans through the provision of generous scholarship programs: Samoff and Carrol posited that “the competition between the United States and the Soviet Union found a new battleground in Africa” (p. 14). African leaders were quite aware of this situation, and leaders like Nyerere in Tanzania and Nkrumah in Ghana tried to steer their countries’ development onto a path that integrated elements of both capitalism and socialism (Samoff & Carrol).

More recent “partnership programs” between African institutions and universities in higher-income countries reveal similar relationships of control: The extensive use of the term “partnership” in a relationship among unequals obscures existing inequalities and power differentials (Samoff & Carrol, 2003). In the case of partnerships with U.S. institutions (as is the case in many other parts of the world), the U.S. partner receives most of the money from the funder, use of resources and accounting is secretive, and the African partner has little say over the development of the program. Curricular and pedagogical models employed originate in the U.S.A. with little regard for the African

partner's needs, thus making the partnership disempowering and endangering sustainability (Samoff & Carrol).

Intellectual dependence is thus maintained on a variety of levels from global systems of academic recognition through publications and research grants that are controlled by Western institutions and organizations, down to the deep level of external influences over intellectual structures and priorities of African institutions of higher learning, and the dominance of the English language in research and teaching (Kanu, 2005; Samoff & Carrol, 2003).

Makgoba and Seepe (2004) critically interrogated the now popular concept of Africanization and cautioned that the term and its meaning were not yet well understood and were often compromised by stereotypical images of political instability, poverty, diseases, as well as lack of education and of scholarship. With respect to higher education reforms in Africa, Makgoba and Seepe noted that "Africanisation is therefore not about having enough African faces in institutions. It is about the grounds for knowledge, about epistemology, about objects of our intellectual inspiration" (p. 42). The notion of an African Renaissance, as often cited by South African President Mbeki, and which encompasses the empowerment of African people to take charge of their own destiny, is closely linked to the concept of Africanization (Malan, 2001).

It has been argued that there exists a disconnect in some postcolonial societies between the curricula which frequently focus on the traditional liberal arts majors, and the needs of the country that demand new academic majors (Sunal & Haas, 1998). Zajda (as cited in Kanu, 2005) maintained that curricula are now global constructs under which Western universities transfer educational frameworks to lower-income countries, without

taking into consideration the local political, cultural, economic, and social context. As a consequence, many graduates face difficulties finding employment upon graduation.

Although there is some truth in this assessment, it ought to be noted that Zajda's statement is a generalization that does not take into account the existence of South-South or North-South partnerships that are sensitive of the partners' needs and contexts. It also gives the false impression that universities in the Majority World are passive recipients of Western education without any agency of their own. Finally, it neglects existing reciprocities in education: Western universities also send scholars and students to their Southern partners to learn about educational frameworks and paradigms with which they are unfamiliar.

The persistent use of the colonial languages also hampers efforts at Africanization or indigenization of curricula. Several authors have made a strong argument for the vital importance of vernacular languages (Blaud, 2001; Makgoba & Seepe, 2004; Teferra & Altbach, 2004). Makgoba and Seepe claimed that postcolonial societies would not be able to advance if the majority was forced to work and live their life speaking a minority language. Education in a foreign language provides a handicap for children from the start because it alienates them from their environment and their learning abilities (Blaud). These scholars have called for the development of African languages to use in a number of disciplines in order to be considered serious "competition" for colonial languages.

Kanu (2005) carried out an in-depth study on teacher education in Pakistan where in-service teachers at the Institute for Educational Development (IED) at Aga Khan University in Karachi received instruction from expatriate instructors. Kanu paid particular attention to the ways in which expatriate instructors transferred their Western

understanding of good academic and intellectual discursive practice to classrooms in a cultural setting that they did not well understand. Based on her findings that the curricula at IED lacked understanding of indigenous modes of learning and discursive practices, Kanu concluded that the use of expatriate educators in postcolonial states was fraught with difficulties as they operate from deeply embedded cultural frames of reference. Resisting this unbalanced academic relationship necessitates a reconceptualization of curriculum internationalization and a critical interrogation of international academic relations between lower- and higher-income countries.

Federici and Caffentzis (2004) used the World Bank-managed African Virtual University (AVU) as an example to demonstrate the intellectual poverty of courses instituted under the structural adjustment paradigm. No African languages are taught at AVU; export management is stressed over reliance on local markets; history, philosophy and social sciences courses are not being taught; and the whole curriculum appears to be geared to the acquisition of narrowly defined skills in the service of neoliberal policies. However, there are also more positive and promising examples: In the Anglophone part of the Caribbean, the British “O”-level and “A”-level exams have been replaced with Caribbean-designed examinations, thus raising the local relevance of course materials, although the curriculum in the overall system still operates in an elitist and stratifying manner (Hickling-Hudson, 2004b).

Education systems all over the world are suffering from quantitative scarcity of provision and are badly developed due to unevenness of quality (Hickling-Hudson, 2004b). Access is one of the major problems in postcolonial societies. Under colonial rule, access to secondary and postsecondary education was deliberately kept low by the

colonizers. Furthermore, access was restricted to those living close to metropolitan centres, and education was practically unavailable outside of those centres (Rodney, 1982). By the time of independence, many African nations had fewer than 20 African secondary school graduates, and many had no postsecondary graduates at all (Rodney). At the same time, the colonizers were busy developing their own educational systems at home: As Rodney so aptly noted, “Cecil Rhodes could afford to leave a legacy of lavish scholarships to white students for study at Oxford University, having made a fortune from exploiting Africa and Africans” (p. 246).

Sunal and Haas (1998) identified the hidden costs of African higher education institutions as one of the major structural problems facing these institutions. According to these authors, the costs of higher education for African students outnumber the costs for Asian students by a factor of six, and for Latin American students by a factor of nine. Sunal and Haas cited the following as factors for the high costs of African tertiary education: “small institutions, subsidies for staff, large staffs, subsidies for students, and inefficient use of resources” (p. 43). Sunal and Haas saw the solution to these problems in a substantial restructuring of the African higher education system along market-based models. Denning (2005) described these changes with respect to “university education [having] been largely refigured not as a public good but as a private investment in scarce cultural or human capital” (p. 6). He pointed in particular to the growth of distance education and outlined that the world’s five largest distance universities were all based in lower-income countries at the dawn of the new millennium. Denning maintained that this method of providing education reduces the educational endeavour to a global mass culture.

Structural adjustment, however, as called for by Sunal and Haas, has in the past mostly exacerbated already existing challenges to the education sector. Osha (2000) argued that chronic underfunding (often the result of structural adjustment cutbacks) was one of the most serious structural problems of all African universities. Osha described the consequences of such underfunding, ranging from water and electricity shortages, overcrowding of classrooms, and low remuneration for local teaching staff. It is practically impossible for academic staff to participate in international or even local conferences, and funding for individual or group research is virtually not existent. It is widely believed that many of the contemporary problems are linked to structural adjustment policies imposed by the World Bank.

According to Federici and Caffentzis (2004), a practical result of this trend is the replacement of educational/professional systems developed in postindependent states with a technocratic education system aimed at strengthening international capital and the general goals of structural adjustment. In fact, the authors have gone as far as claiming that structural adjustment has reversed the educational policies achieved and implemented in the postcolonial period. Tikly (2001) assessed structural adjustment policies within the framework of economic globalization and argued that a purely economic view of globalization neglected the impact of political, cultural and other aspects of globalization on the education system.

In spite of the persisting linkages to the metropolitan universities in the 1960s and 1970s, and in spite of many other limitations, Federici and Caffentzis (2004) argued that African countries managed to develop unique educational systems that served postcolonial societies. African institutions were expected to commercialize their

operations and to abandon critical knowledge paradigms in favour of depoliticizing knowledge into technical and pragmatic forms that support the neoliberal development agenda. As a result of these policy adjustments, unrest at universities rose, and they were increasingly seen as a threat to stability which caused further World Bank involvement in education. Ghana, for example, introduced its four-year economic recovery programme late in 1982, based on which it received a conditional credit from the IMF (Bentsi-Enchill, 1984). By mid-1983, all three Ghanaian universities were closed, and the National Union of Ghanaian Students was leading demonstrations against the Rawlings government (Bentsi-Enchill, 1984). By the end of 1984, university fees were seriously discussed in the wake of a more market-oriented and individualistic perspective of tertiary education which held “that the individual benefits substantially from higher education quite apart from the gains to the society as a whole, and that the individual beneficiary must therefore make a financial contribution to support higher education” (Asante, 1984, p. 2259).

The postcolonial situation has also created unfavourable conditions for research in the South. Universities in industrialized countries are the major global producers of knowledge, whereas African scholars are kept from consuming many resources on research output, and are generally confined to using the research produced by Western colleagues which those are prepared to share (Nyamnjoh, 2004; Teferra & Altbach, 2004). Similar tendencies are at work with respect to collaborative North-South research in which African collaborators are frequently downgraded to research assistants, as well as with respect to the publication of African scholarly works in leading journals that are controlled by Western academics (Makgoba & Seepe, 2004; Nyamnjoh). The research

agenda is controlled by those who fund research, and such research is mostly motivated by political and/or economic reasons (Makgoba & Seepe). Because the money to fund research in Africa is not located on that continent, outsiders continue to control African institutions.

Chilisa (2005) used HIV/AIDS research in Botswana as an example to highlight the marginalization of indigenous knowledge systems in educational research in postcolonial societies. Mainstream Western research epistemologies assume universal validity in the collection, analysis, and interpretation of knowledge (Chilisa), leaving little room for those whose worldviews are constructed around different epistemologies.

Several programs have been devised that aim at strengthening former colonies' self-determination. Based on Tanzanian president Nyerere's vision of postcolonial education that aimed to instil in students both a sense of critical analysis and a commitment to societal service, history curricula in Tanzania were rewritten from a socially conscious African perspective, Swahili was introduced as an educational language at the University of Dar es Salaam, and courses on Afro-American and Afro-Caribbean literature were added in the literature departments (Nkulu, 2005). Nyerere also introduced mandatory National Service and Education for Self-Reliance, for which he was heavily criticized. His critics argued that Nyerere's efforts to influence students into adopting a communal attitude of solidarity, sharing and social responsibility amounted to an attempt to change higher education from a liberal model into a strictly utilitarian model. This struggle between liberal and utilitarian models was also evident in recruitment and admission policies to universities that became linked to prospective students' performance in their work placements before enrolment at the university (Nkulu).

Similar to the Tanzanian example which is based on a socialist vision of society, the Cuban tertiary educational model and its scholarship system for students from other lower-income countries are deeply rooted in revolutionary ideology. Hickling-Hudson (2000a) outlined how the Cuban scholarship program had made visible a tertiary educational model that was very different from the models that former colonies inherited from their metropolitan masters. Former colonies who send their students to Cuba for study benefit from the return of skilled graduates who aid in their home countries' decolonization efforts through the building of endogenous capacity, thus reducing their reliance and dependency on industrialized countries (Hickling-Hudson, 2004a).

In his eminent and visionary book *The wretched of the earth*, written only a few years after many colonies gained independence, and long before the formal decolonization process had been completed, Frantz Fanon (1963) argued that colonialism had produced a certain colonial personality characterized by a “mental pathology which is the direct product of oppression” (p. 251). It is important to remember that colonization did not start with Europeans settling in far-away countries and taking over their social and economic systems, but that this phase of colonial rule was preceded by almost four centuries of trading in African captives who became slaves to Europeans, either in Europe itself or in the newly colonized territories in the Americas (Rodney, 1982). It would be illusionary to think that people can shed a 500-year history of oppression that has left a profound mark on the collective psyche, at the moment when they become “liberated and independent” nations. It should come as no surprise that many postcolonial societies, in particular in Africa, have not managed to build up their social, economic and educational systems from within to reflect their own identities. The 500-year colonial

effort was explicitly and implicitly directed at making people lose any sense of identity, and the past 40-50 years of independence have not allowed for sufficient time and space to retrieve those lost identities.

Scholars writing on postcolonial tertiary education seem to fall into two broad categories: those who reject the development discourse and argue against the continued application of Western educational models in order to improve the lot of the people in former colonies; and those who write from a eurocentric perspective by arguing that the ills of former colonies might be rectified if they can catch up with the West, and that education systems modeled on Western institutions are key in that regard. Tikly (2004) has summed up this dilemma well by saying that “it is a problem of how to go beyond the existing order of knowledge whilst being obliged simultaneously to work within its framework” (p. 192). For Tikly the question of how education can be transformed from its current functionalist and technological nature into a potentially liberating institution is key.

Achieving the delicate balance between the utilitarian and liberating functions of education was key to Nyerere’s vision. Nkulu (2005) noted that

Nyerere’s hope that an educated person should have the qualities of a critical analyst, a problem solver, and a servant of the common good reflects, therefore, a much-needed balance for higher education to become critically and analytically empowering, socially useful, and human-centred, but not excessively capital-centered. The fact that educational leaders in the United States are now calling for increased commitment to community service suggests the extent to which Nyerere’s

vision of higher education for the twenty-first century is relevant to the West. (p. 129)

The practice of “service learning” has recently appeared on the landscape of Western universities to denote a learning process that occurs through serving in a community setting. Western institutions of higher learning seem to move increasingly towards educational models that provide a balance between liberal and utilitarian education. Nyerere’s perspective on higher education is thus still highly relevant as a critical framework for assessing educational practices in different parts of the globalizing world. It is somewhat paradoxical that both revolutionary postcolonial education systems and neoliberal systems have been criticized on the same grounds: the overreliance on utilitarian models of education.

We must not be naïve, however, about the possibilities afforded by education in the postcolonial context. Although education can empower people and enable them to become responsible citizens that actively resist domination, political and economic rivalries among different states over access to local resources can quickly render much careful educational work futile. Colonial structures that lie deeply embedded in people’s consciousness and subconsciousness, and that manifest themselves in all societal institutions, are formidable barriers to any “quick educational fix”. The most promising way forward may lie in a “small steps” approach where programs such as the Cuban tertiary scholarships help build endogenous capacity over time. Any large scale policy prescriptions imposed by outside agencies are highly unlikely to adequately address the needs of postcolonial societies.

## **Chapter 3 – Research Methodology and Methods**

### **Research Strategy, Design and Methods**

As reported in the literature discussion, some quantitative studies exist in various related areas, in particular regarding the link between tertiary education and migration (e.g., Chanda, 2002; Pires, Kassimir, & Brhane, 1999; Saravia & Miranda, 2004). These authors recognized the limitations of a strictly quantitative approach and pointed to the benefits of related qualitative investigations. I therefore decided early in the process to design my study using a qualitative framework that would allow for some preliminary conclusions to be drawn about the impact of the Cuban scholarship program on a group of graduates and former program administrators selected for this study.

Mason (2002) asserted that qualitative research is “exploratory, fluid and flexible, data-driven and context-sensitive” (p. 24). With that in mind, I set out to remain as open as possible throughout the various phases of my research journey to making changes with regard to strategy and design decisions. After getting clarity on my research puzzle and the questions to which I was seeking responses, I considered a number of possible research methods and strategies, carefully weighing their advantages and disadvantages.

At least two types of highly bounded case study designs would have been feasible to address the research problem. The first one would have been an in-depth case study of one or two graduates from the Cuban scholarship program that would have taken a detailed look at the students’ life trajectories before, during and after studying in Cuba. Although such a phenomenological design would have resulted in particularly thick descriptions of this/these individuals’ experiences, it would not have allowed for any generalizations since I would have only been able to report on highly individual

experiences, rather than looking for patterns. Because my research dealt with oral testimony of the participants requiring them to recall events from over 20 years ago, I had to expect a considerable level of subjectivity and discrepancies in the memory collection of different graduates. I therefore had to rely to some degree on data triangulation and comparisons between different participants' accounts which I would not have been able to apply had I chosen to follow a phenomenological approach. Excluding former administrators from the study would have ignored the input and perceptions of an important constituent group of persons who were involved in the day-to-day management of the program.

Another possible bounded case study design would have been an in-depth ethnographic study of a community in which a Ghanaian program graduate is working. Such a design could be very enlightening, in particular with respect to research question 4 (Do the Ghanaian graduates report having made any contributions to the development process in Ghana? If so, how? Do they see a link between these contributions and the Cuban educational philosophy which emphasizes human development and is based on an ethic of altruism?). The design would provide an opportunity to explore my topic from the perspective of a disadvantaged segment of the population or from the viewpoint of those for whose benefit development programs are designed. However, such an in-depth ethnographic study would not have been likely to yield the necessary data to answer most of my other research questions.

Rather than generating data through interpretive qualitative interviews, I could have designed a larger-scale survey study. The advantage of a survey approach would have been that I could have potentially reached a large number of graduates and administrators

in different countries, thus providing a good opportunity for comparisons across different contexts. However, this design would have provided a number of formidable challenges. Gaining access to mailing addresses or e-mail addresses for a large number of graduates would have been difficult, if not impossible. As I explain later in this chapter in more detail, issues of confidence and trust impacted my study in a very profound manner. Thus, even if I had been able to obtain the necessary co-ordinates for mailing survey instruments to potential participants, it would have been highly unlikely that more than a few people would have returned the survey. The logistics involved in mailing the survey instruments and consent forms would have also been prohibitive: Mail service to some African countries is not always reliable, and providing return envelopes poses logistical challenges due to the necessity for postage paid marks. Most importantly, however, the mechanistic nature of a survey study would not have provided me with the richness of data and insights that can be generated from more extensive qualitative interviews.

Finally, an analysis of documentary sources could also provide a meaningful method to approach my research. Such documents might include, but would not be limited to, curricular materials used in the program in Cuba, poverty reduction strategy papers, white papers on poverty and development, and donor agency reports on development projects. However, my main interest is in generating data rather than collecting and interpreting data that already exist in text. I was also acutely aware that documents directly related to the Isle of Youth program could be classified and thus likely unavailable to me within a time- and resource-bounded doctoral study.

I was interested in the lived realities of people who were directly involved in and impacted by the Cuban scholarship program. My research framework was grounded in

the philosophy that giving voice to those for whom the program was designed, and by whom the program was executed, afforded legitimacy to the perspectives of those who had little or no input into the policy decisions around the initial conceptualization of the program and its after effects. It therefore followed from my ontological and epistemological positions, and from the logistical realities and limitations regarding this type of research, that the most suitable way to approach my research questions was through conducting semi-structured interviews with a qualitative sample of program graduates and former administrators. Focussed qualitative interviews would allow me to uncover and contextualize the lived realities of those who participated in the Isle of Youth program. I concluded that semi-structured conversations around the meaning-making which graduates and administrators derive from their experiences with the Cuban scholarship program would maximize opportunities for the construction of contextual knowledge. Generalization to a broader population of Cuban program graduates either in Ghana or in other recipient countries was not necessarily a goal of this particular research design; rather, I was interested in the uniqueness of the experience of the interviewees (Hays, 2004).

I assumed that qualitative/interpretive interviews would provide me with a broad overview of the participants' understandings regarding the linkages between the theoretical aspirations and practical experiences associated with this program, and the development process in their home country. Semi-structured, conversational interviews also allow for adjusting the data generation process according to overt, subtle and non-verbal cues that are observable in the interaction between researcher and study participants. As I shall explain in more detail below, this latter point proved to be

particularly important during the data generation process due to the participants' multi-layered perceptions of my identity as an "outsider-researcher".

### **Sample**

My qualitative sampling procedure was strategic and illustrative in order to allow for conclusions to be drawn from the data analysis that would provide some responses to my research questions. Due to the nature of the research, the method employed, and the effort associated with data gathering, it was obviously neither possible nor necessary to use a representative sampling technique. Rather, the objective of sampling in this context was to create a sufficiently large sample to help me understand how the meanings attached to the Cuban scholarship program by the study participants intersect with their understanding of development in Ghana within the global postcolonial environment.

Because I was concerned with two types of sample categories in this study - countries and people – I used a two-pronged sampling strategy, consisting of criterion-based sampling and snowball sampling (Miles & Huberman, 1994). I applied criterion-based sampling to identify the country on which I was going to focus my study, and snowball sampling to identify the individual study participants. I had originally planned to include more than one country in my research, but found out quickly that doing a comparative study between countries would be outside the scope and possibilities of my doctoral work. In order to identify the country where I was going to carry out my research, I took the following criteria into consideration: (1) geographic location, (2) position on the human development index, (3) practicability and logistics (travel, security, costs, access to participants, language), (4) number of graduates from the Cuban

scholarship program, (5) discussions with the Head of the Office of Foreign Students within the Cuban Ministry of Higher Education, International Relations Division.

#### Geographic location

As outlined earlier, the vast majority of international scholarship students in Cuba before 1990 came from African countries, with 28,132 foreign scholarship holders graduating from Sub-Saharan African countries between 1961 and 2001, constituting 70% of total international graduates (Ministerio de Relaciones Exteriores de Cuba, n.d.). Related research that has been carried out in the past, primarily by Hickling-Hudson, focused on the Caribbean region. It thus appeared useful to choose an African country for this study to provide a perspective from a postcolonial society in a different part of the world. The patterns of colonialism and pre-colonial histories in Sub-Saharan Africa differ considerably from the Caribbean region, and choosing a Sub-Saharan African country thus maximized the possibility to study the relevance of the Cuban model to residents of a country that differs considerably along socio-cultural and political dimensions. I was thus able to expand the set of data generated by Hickling-Hudson for further research.

#### Position on human development index (HDI)

Because the notion of human development is one of the key concepts with which this study is concerned, I only considered countries for inclusion that ranked in the lowest third of the “medium human development” classification, or that ranked in the “low human development” classification, below 116 on the HDI (with higher numbers signifying lower human development). I acknowledge that this is only a proxy indicator of a country’s and its people’s condition along a range of dimensions which attempt to measure their wellbeing; however, of the available indices, I consider the HDI a tool that

is more reflective of a people's situation than those tools focusing primarily on economic indicators.

### Practicability and logistics

I only took countries into consideration for which there was no travel advisory alert in place by Foreign Affairs Canada in order to ensure a reasonable degree of safety while traveling. The cost factor was another reason why I decided to limit myself to one country: Had I chosen to include two or more countries in the study, the need for extensive travel to multiple locations would likely have exceeded a manageable financial framework for this research. An important factor in choosing a location was presented by the extent to which I was able to gain access to study participants. As I elaborate further in the section on the second qualitative sample category, access to participants became a decisive factor once I had narrowed down the potential countries for inclusion in the study. The final consideration with respect to practicability was a linguistic one. I am fluent in English and have a good working knowledge of French. I do not speak Portuguese and therefore excluded countries like Angola and Mozambique that had large schools on the Isle of Youth, but where the colonial language is Portuguese. I also had concerns about conducting interviews and using technical language in French, so I decided to exclude countries like Mali and the Republic of Congo/Democratic Republic of the Congo. Because I do not speak any vernacular African languages, I decided to limit myself to countries where the colonial language is English. Although all graduates from the Cuban program are also able to communicate in Spanish, my command of Spanish is not good enough to conduct the interviews in that language.

### Number of graduates per country

In order to obtain a viable criterion-based sample, it seemed advisable to choose a country with a significant number of citizens who had graduated with a Cuban credential. I consulted the UNESCO Global Education Digest 2006 for detailed figures on internationally mobile students studying in Cuba and other countries for the year 2004. Although these figures do not necessarily exactly relate to the size of the Cuba-graduated alumni and alumnae population from a particular country, they nevertheless serve as a good approximation in this regard.

### Discussions with Cuban Ministry of Higher Education

During a conference in Havana in February 2006, I discussed potential focus countries with the Head of the Office of Foreign Students within the Cuban Ministry of Higher Education, International Relations Division. He indicated at the time that including (an) African country/ies in the study would be preferable, if at all possible, precisely because no research had been carried out on the impact of the Cuban scholarship program on the large number of African students who graduated from the program.

Based on the best available synthesis of the above considerations, I originally identified South Africa as a possible country on which to concentrate my study. At that point, it was proposed to me that I might want to consider Ghana as the focus of my research because there was a sizeable Ghanaian population in the Bahamas with whom I would be able to get in touch relatively easily. In keeping with my commitment to stay open and flexible to making changes to my research design and decisions, I considered this option and decided to focus on Ghana for three main reasons: (1) Ghana met all the

stipulations I set out earlier in this chapter; (2) in an environment where I had to rely to a large extent on word of mouth for the recruitment of participants (see section below), focusing on a country where I had a reasonable level of assurance that I would be able to find study participants formed an important part in my decision-making process; and (3) the inclusion of a distinct group of African graduates from Cuba living in a third country presented the potential for making comparisons between those who had returned to their home country after graduation, and those who had decided to leave.

The group of graduates who went from Cuba to the Bahamas did so for a variety of reasons. When word came from those who had returned to Ghana about difficulties that they experienced in their home country, some students who were still in Cuba felt discouraged and decided to move to the Bahamas after finishing their postsecondary studies. Once some graduates had established themselves there, they encouraged others to join them. The Bahamas had already been a popular vacation destination for Ghanaian students in Cuba, and the country was thus not completely foreign to them. Settlement in the Bahamas was facilitated by the immigration regulations that were in place at that time for Ghanaian citizens, and which allowed entry without a visa. Due to the country's proximity to Cuba, the Bahamas were particularly attractive for those graduates who had started families in Cuba, and whose wives and children were unable or unwilling to leave Cuba. It was a common perception that it was fairly easy to earn a good salary in the Bahamas; however, the graduates found out quickly that obtaining a work permit presented a barrier due to preferential treatment for Bahamians in recruitment processes. Securing a job in the graduates' field of study also proved difficult for several of them

due to problems with the recognition of their Cuban credentials. I have discussed this issue in more detail in chapter 4.

After I had decided on a country, I dealt with the second qualitative sample category pertinent to my study: the actual study participants. I planned to include primarily graduates from the Cuban scholarship program, together with a number of administrators involved in the program. I stayed open to including other populations, and that opportunity arose later when I had the chance to interview a number of Ghanaian teachers who had taught on the Isle of Youth. I planned to interview at least 25 graduates from different fields of study and different graduation dates, spanning a period of about 10 years. I also expected to interview about five administrators. I aimed to interview men and women in proportion to the involvement of both sexes in the program.

I intended to speak with two distinct samples of participants: those living in the Bahamas, and those back in Ghana. I was directed to one of the Ghanaians living in the Bahamas through a Cuban contact. After initiating contact with him via e-mail, and explaining the intent of my study, I received the assurance that he was going to make the necessary contacts with program graduates in advance of my arrival in Nassau, Bahamas. Due to the nature of this study, I had to rely to a large extent on snowball sampling through word of mouth once I had identified the basic study criteria.

Two themes dominated the process of locating study participants: the importance of local organizers, and gaining participants' trust. Without the former, the latter would not have been possible. I have elaborated further on this issue in the below section on participants' perceptions of the researcher's identity. I spent two weeks in Nassau in March 2007 during which I interviewed ten program graduates, all of whom were male.

The local organizer in Nassau played an essential role in making contact with potential study participants, assisting me in explaining the purpose of my research, and logistically arranging the setup of the meetings. Sampling proceeded by self-selection: My contact informed all the graduates living in and around Nassau of my presence and of the purpose of my research, and he helped me set up interviews with those willing to participate in the study.

By the time I arrived in Nassau, the local organizer there had already been in touch with one of the former program administrators in Accra who agreed to assist me in locating study participants during my subsequent trip to Ghana. The organizer in Nassau also suggested that I place an announcement about my research on the [ESBEC.COM](http://ESBEC.COM) website. This website was designed and is maintained by a graduate from the Isle of Youth and Cuba scholarship programs, and is used extensively by graduates back in Ghana and throughout the world to stay in touch with one another and share information of common interest via a secure blog that is only accessible to members. At the time when this suggestion was made to me, the website also had a classifieds section that allowed anybody to post messages (in the meantime, the website design has been changed, and the classifieds section is no longer available). I posted a message in this section on February 8, 2007, inviting program graduates to participate in my study (see APPENDIX A for a copy of the message). I subsequently received 13 direct responses from graduates in different parts of the world, including one from Canada. I learned about another graduate living in eastern Canada through a contact at my own university, and a Ghanaian former program administrator provided me with contact details for another former administrator living in Canada. I was able to meet with one of the graduates and

the administrator in May 2007 in eastern Canada, and conducted a telephone interview with the other graduate in June 2007. One of the graduates was male, the other female.

After my return from Nassau, I contacted the former program administrator who had indicated his willingness to assist me with the interviews in Accra. Because I was informed that there is no database of graduates from the Isle of Youth program in Ghana, the sampling in Ghana proceeded in that my contact person initially sent a letter to those for whom he happened to have addresses and asked them to spread the word amongst their colleagues. He appended my letter of consent (see APPENDIX F) to his message. In co-ordinating the meetings, my contact person indicated to me that he aimed for representation in terms of sex, profession, and credential level (polytechnics and university graduates). He also arranged for meetings with teachers who worked on the program, as well as officials (senior civil servants) of the ministries and agencies that participated in the recruitment, orientation and transportation of students to Cuba.

Apart from interviews with three of the Ghana-based graduates who had contacted me following the posting on [ESBEC.COM](http://ESBEC.COM), my contact person was able to arrange for a considerable number of additional meetings with graduates and former administrators. Over the course of two weeks in July 2007, I met with 30 male graduates and six female graduates of the program. I also met with four former administrators and three teachers who had taught the Ghanaian children at the secondary level on the Isle of Youth. It became apparent from the interviews that all administrators/civil servants who participated in the study were very closely linked to the Rawlings administration that came to power through a coup at the end of 1981.

With the exception of the three Ghana-based graduates and one Canada-based graduate, I did not interview any of the other nine persons who had contacted me following the posting on ESBEC.COM. They were either living in countries other than Ghana, the Bahamas, and Canada, or in remoter areas of Ghana outside of greater Accra where I did not travel.

Tables 2-5 provide some demographics about the graduates who participated in this study. For a variety of reasons, the information is not complete for all 48 program graduates who participated in the study. I will explain the reasons for any missing data as I discuss each table. Summary characteristics of the sample, broken down by location at time of study and sex, are provided in Table 2. Tables 3 to 5 contain further demographic information about some of the graduates who participated in this study.

**Table 2 Summary characteristics of study sample**

| <b>Type of participant</b>      | <b>Male</b> | <b>Female</b> | <b>Location at time of study</b> | <b>Total</b> |
|---------------------------------|-------------|---------------|----------------------------------|--------------|
| Graduate (former student)       | 10          |               | Bahamas (greater Nassau)         | 10           |
| Graduate (former student)       | 30          | 6             | Ghana (greater Accra)            | 36           |
| Graduate (former student)       | 1           | 1             | Canada (eastern Canada)          | 2            |
| Administrator                   | 4           |               | Ghana (greater Accra)            | 4            |
| Administrator                   | 1           |               | Canada (eastern Canada)          | 1            |
| Teacher                         | 1           | 2             | Ghana (Accra)                    | 3            |
| <b>Total study participants</b> | <b>47</b>   | <b>9</b>      |                                  | <b>56</b>    |

Table 2 provides summary statistics of the qualitative study sample, including the 48 graduates interviewed and the eight administrators/teachers. The majority of graduates interviewed currently live in the Greater Accra Region, and I have discussed this matter further in the section on Limitations of the Study. The sample of graduates is extremely gender-skewed; however, the gender distribution is reflective of the program characteristics. As discussed in the section on Gender Issues in chapter 4, the initial ratio of female to male students was 1:5; however, since female students were only selected during the first three program intakes, and not during the last three intakes, the overall ratio of female to male graduates can be expected to be much lower.

**Table 3 Graduates' postsecondary study programs**

| <b>Postsecondary program of study</b>           | <b>University-level (U)<br/>or Polytechnical (P)</b> | <b>Number of<br/>graduates</b> |
|---|--|--------------------------------|
| Accounting and finance                          | U  | 1                              |
| Agronomy  | P  | 4                              |
| Automation control/engineering                  | U  | 6                              |
| Chemical engineering                            | U  | 5 (one Master's<br>level)      |
| Chemical engineering/pharmaceutical<br>sciences | U  | 1                              |
| Civil construction                              | P  | 1                              |
| Clinical laboratory                             | P  | 2                              |
| Computer science                                | U  | 1                              |
| Dentistry                                       | U  | 1                              |

|                                |        |           |
|--------------------------------|--------|-----------|
| Economics                      | P      | 1         |
| Food science                   | U      | 1         |
| Health statistics              | P      | 1         |
| Human medicine                 | U      | 4         |
| Industrial engineering         | U      | 1         |
| Laboratory medicine            | U      | 1         |
| Management                     | P      | 1         |
| Pharmaceutical sciences        | U      | 1         |
| Radiography                    | P      | 1         |
| Telecommunications engineering | U      | 1         |
| Veterinary medicine            | U      | 7         |
| Unknown field of study         | P or U | 6         |
| <b>Total polytechnical</b>     |        | <b>11</b> |
| <b>Total university</b>        |        | <b>31</b> |
| <b>Total unknown</b>           |        | <b>6</b>  |
| <b>Overall total</b>           |        | <b>48</b> |

Table 3 lists – in alphabetical order - the graduates' programs of study in Cuba at the postsecondary level, indicating for each program whether it was a university-level or polytechnical program. Eighteen out of the 48 graduates are concentrated in the three fields of veterinary medicine, automation control/engineering, and chemical engineering, with the remaining graduates distributed widely across a range of programs. The sample contains more university graduates than polytechnical graduates, although the

administrators and graduates reported that the program focused on polytechnical careers and provided more polytechnical than university places annually, at least during the first few years. Several reasons for the larger number of university graduates represented in the sample are conceivable. As discussed in chapter 4, polytechnical graduates faced particular challenges and reported grievances with the program, and it is possible that they would therefore have been less willing to participate in a study related to the Isle of Youth program. Secondly, because of the perceived ranking of postsecondary programs and the status attached to certain programs, polytechnical graduates might have felt less comfortable talking about their experiences. Finally, the higher number of university graduates could be related to the snowball sampling technique if the organizers in the two main locations were able to access those graduates more easily than polytechnical graduates.

**Table 4 Intake and graduation dates**

| <b>Year students went to Cuba</b> | <b>Number of students who went in that year</b> | <b>Year graduated</b> | <b>Number of graduates</b> |
|-----------------------------------|---|-----------------------|----------------------------|
| 1983                              | 7   | 1988                  | 1                          |
| 1984                              | 0   | 1989                  | 0                          |
| 1985                              | 7   | 1990                  | 1                          |
| 1986                              | 8   | 1991                  | 0                          |
| 1987                              | 3   | 1992                  | 1                          |
| 1988                              | 9   | 1993                  | 4                          |
| 1989                              | 11  | 1994                  | 2                          |
|                                   |   | 1995                  | 5                          |

|              |                       |                       |
|--------------|-----------------------|-----------------------|
|              | 1996                  | 2                     |
|              | 1997                  | 3                     |
|              | 1998                  | 8                     |
|              | 1999                  | 2                     |
|              | 2000                  | 3                     |
|              | 2001                  | 5                     |
|              | 2002                  | 3                     |
|              | 2003                  | 0                     |
|              | 2004                  | 0                     |
|              | 2005                  | 1                     |
| <b>Total</b> | <b>45<sup>a</sup></b> | <b>41<sup>b</sup></b> |

*Note.* All graduation dates refer to first degree obtained in Cuba. Graduation dates for those who returned to do a Master's degree are not listed.

<sup>a</sup>Year of intake was unavailable for three graduates. <sup>b</sup>Year of graduation was unavailable for seven graduates.

Table 4 shows the year of intake and graduation for most students. A few dates are missing because the information was not collected during the interviews. Especially during the larger group interviews, it was often difficult to ensure that this type of demographic information was recorded for all participants. The Isle of Youth program had six intakes between 1983 and 1989; in 1984, the organizers did not send any students to Cuba for reasons explained in the first section of chapter 4. The 45 graduates for whom intake years are available are relatively evenly distributed over the six years, with 22 graduates having gone to Cuba in 1983, 1985, or 1986, and 23 graduates in 1987, 1988, and 1989. The year of graduation shows a wider distribution since two main factors

impinged on the number of years the students spent in Cuba. On average, students who completed polytechnical credentials stayed for shorter periods of time than students who went to university. While most students going to Cuba from 1985 to 1989 were recruited at the early secondary level, the seven students in the sample who went to Cuba in 1983 would have been at various levels since the Ghanaians had to initially fill all levels of their school on the Isle of Youth. Overall, though, the graduation dates are quite evenly distributed, with an outlier in the year 1998.

**Table 5 Geographic and socio-economic background**

| <b>Region of residence at time of application to Isle of Youth program<sup>a</sup></b> | <b>Total number of students from Region</b> | <b>Year of intake</b> | <b>Number of students per intake year</b> |
|--|---|-----------------------|---|
| <b>Upper West</b>  | 3   | 1987                  | 1   |
|  |   | 1988                  | 1   |
|  |   | 1989                  | 1   |
| <b>Upper East</b>  | 2   | 1986                  | 1   |
|  |   | 1989                  | 1   |
| <b>Brong Ahafo</b>   | 0   |                       |   |
| <b>Northern</b>  | 5   | 1983                  | 2   |
|  |   | 1986                  | 3   |
| <b>Western</b>   | 2   | 1983                  | 1   |
|  |   | 1989                  | 1   |
| <b>Volta</b>   | 3   | 1983                  | 2   |
|  |   | 1986                  | 1   |

|   |                           |         |   |
|---|---------------------------|---------|---|
| <b>Eastern</b>  | 3                         | 1983    | 1 |
|   |                           | 1985    | 1 |
|   |                           | 1989    | 1 |
| <b>Central</b>  | 6                         | 1985    | 3 |
|   |                           | 1987    | 1 |
|   |                           | 1989    | 2 |
| <b>Ashanti</b>  | 1                         | 1988    | 1 |
| <b>Greater Accra</b>  | 15                        | 1985    | 1 |
|   |                           | 1986    | 3 |
|   |                           | 1987    | 1 |
|   |                           | 1988    | 5 |
|   |                           | 1989    | 3 |
|   |                           | unknown | 2 |
| <b>Total</b>  | <b>40</b>                 |         |   |
| <b>Place of residence at time of application characterized as a....</b> | <b>Number of students</b> |         |   |
| <b>City</b>   | 12                        |         |   |
| <b>Town</b>   | 8                         |         |   |
| <b>Village</b>  | 5                         |         |   |
| <b>Total</b>  | <b>25</b>                 |         |   |
|   |                           |         |   |

| <b>Parents would have been able to afford the graduate a similar education in Ghana</b> | <b>Number of students</b> |  |  |
|---|---------------------------|--|--|
| <b>No</b>   | 13                        |  |  |
| <b>Yes</b>  | 10                        |  |  |
| <b>Yes, with restrictions/hardship</b>  | 2                         |  |  |
| <b><i>Total</i></b>   | 25                        |  |  |

<sup>a</sup>Regions are organized from poorest to richest, as measured by the percentage of their respective populations living in poverty in 1992. Classification taken from “Change and transformation in Ghana’s publicly funded universities,” by T. Manuh, S. Gariba, and J. Budu, 2007, p. 24..

Table 5 provides some information about the geographic and socio-economic background of participating graduates. This information is incomplete for a variety of reasons. I did not systematically collect these data since their importance only became apparent after I had conducted a number of interviews. This is evident in the changes I made to the interview guide after completing and transcribing the interviews in the Bahamas: The interview guide for Ghana (see Appendix C) contains a question that asked specifically about the graduates’ Region of residence. Even after explicitly including this question, it was not always possible to obtain such information, in particular in group interviews where personal questions related to the graduates’ socio-economic background might have been perceived as insensitive and embarrassing. In one group interview setting which proved to be very challenging (see description on p. 201-202) I was explicitly told to not ask for personal demographics. To the extent possible, and where such information was not contained in the interview transcript, I obtained data

about the Region where the graduates resided before they went to Cuba by emailing them and asking for this information. I thus obtained information regarding Region of residence from 40 of the 48 graduates. The classification of Regions from poorer to richer is based on 1992 data and might thus slightly deviate from the situation in the mid- to late-nineties when the students were recruited. The sample is skewed towards the richer Regions, with 15 graduates residing in Regions where more than 50% of the population lived in poverty (Upper West to Volta Regions), and 25 graduates residing in the remaining four Regions with less than 50% of the population living in poverty. Within the four richest Regions, the majority of graduates resided in Greater Accra Region, whereas in the other group, the distribution was somewhat more even across the six Regions, with a slight advantage for Northern Region, and no graduates residing in Brong Ahafo Region.

Caution ought to be exercised in that conclusions about graduates' socio-economic backgrounds cannot be drawn from their Region of residence alone. However, the data provide information that is useful for the discussion in chapter 4 of student recruitment and the program's aspirations regarding the provision of opportunities across the 10 Regions.

Table 5 also contains some information about graduates' place of residence at the time they went to Cuba, as well as a proxy indicator of their family's socio-economic background. This information is self-reported and only available for half of all graduates interviewed. To maintain confidentiality most of this information was collected by e-mail: graduates were asked whether they would classify their place of residence as a city, town, or village, and whether their family would have been able to provide them with a

similar education had they remained in Ghana. Two larger group settings in which I conducted interviews (with six and 14 participants, respectively) did not allow for personal demographics to be discussed in detail since I had to make the most effective use of the limited time that was available for the interviews. Also, as pointed out above, it was intimated to me in one group setting that it would be inappropriate to discuss such matters within the group. The limited information I was able to obtain does suggest that graduates came from a variety of backgrounds, including from smaller settlements, and that there were graduates in the sample whose parents would not have been able to provide them with a comparable education in Ghana. Amongst those who responded to this question, the majority indicated that their parents would not have been able to afford them a similar education in Ghana. I have not included information on intake years in regard to this last indicator since the number of responses is too low to allow for any meaningful correlation of the graduates' family backgrounds and intake year.

### **Researcher's Positionality with Respect to the Topic and the Participants**

In light of my aspiration to provide a voice to graduates of the Cuban scholarship program and to administrators involved in the design and implementation of the program, I inevitably had to struggle with my role as an external researcher with respect to those I was intending to include in my study (Banks, as cited in Johnson-Bailey, 2004). I was aware that I would be researching across cultural, linguistic, historical and colonial boundaries. I realized that I needed to critically examine my authority to engage in this research because I expected some challenges in this respect by the study participants. I regarded the critical examination of my research authority as an ongoing, reflexive process. While I planned to go into my first interviews prepared with explanations about

my role and interests in the research topic, I had to remain open to further examine my assumptions based on the communications I had with study participants. The below discussion of the participants' perceptions regarding my identity will illuminate how critical it was for me to adopt a reflexive stance vis-à-vis my own positionality.

The process of situating oneself as a researcher in one's own research is a complex one. Typologies as the one provided by Banks (as cited in Johnson-Bailey, 2004) which position the researcher either as insider or outsider, as indigenous or external, can provide some assistance in thinking about the researcher-participant relationship in a preliminary fashion. However, in the early stages of the research, and before any interactions with the study participants have taken place, it is difficult, if not impossible, to determine with any exactness how the researcher's relationship to both the topic and the participants might evolve over the course of the research.

Based on Banks's typology (as cited in Johnson-Bailey, 2004), it was obvious that I was entering my research as an external. In fact, I could hardly have been more external to the study participants: They are African, mostly male, black, grew up in Ghana in varying socio-economic circumstances and, in several cases, away from their core family of parents and siblings, during a time of political instability and economic hardships. I am German-Canadian Caucasian, female, white, grew up in comfortable socio-economic circumstances during the German post-war "economic miracle", together with my parents and sister, without ever experiencing first-hand the impact of political unrest and economic difficulties. Many graduates had spent half their lives as older children and young adults studying and living in Cuba, a country and society that differed considerably from their home environment. Apart from brief vacation trips, I never left

Germany for any extended period of time until I started living in Canada in my early thirties.

With respect to Banks's second pair of binaries, the insider-outsider distinction, I felt from the beginning that I did not neatly fit into one or the other category which is meant to reference "the political and cultural position of the researchers: Do they hold the values, beliefs, and views of the people they are studying?" (as cited in Johnson-Bailey, 2004, p. 130). In any situation, it would be difficult to answer this question in advance of the research before actually speaking with the participants – how would the researcher be able to know a priori the values, beliefs, and views the participants are holding? Apparently, making such determinations in the context of my own research would be even more difficult than doing this from an insider perspective where the researcher's profile fits more closely that of the participants.

I entered my research, however, assuming that I was likely somewhat more closely related to the participants along the insider-outsider continuum than my position as an external would suggest. Johnson-Bailey (2004) argued that the literature focuses primarily on the two extremes of Banks's typology: indigenous-insider and external-outsider. The external-insider type does not appear to be well described or understood. Using Banks's typology as an imperfect, yet useful framework, I tended to see myself somewhere in between an external-outsider and external-insider with regard to my topic and the study participants. I based the closer alignment with the participants along the outsider-insider categorization upon a hypothesized common point of reference regarding values and beliefs enshrined in the Cuban educational model which I had extensively studied, though not experienced. I had also extensively studied issues of development in

the Majority World in the context of the postcolonial era of globalization, and against the background of global geo-political events and associations. This middle position is in line with the findings of other researchers who “discover that they are neither wholly insider nor outsider to a community or that their stances differ with different community members” (Beoku-Betts; Zavella, as cited in Preissle & Grant, 2004, p. 175). I entered the research with a considerable level of awareness as to my privileged status as a member of the global minority of power. I committed to constantly reflect upon this privilege as part of the research process in order to minimize any “blindness” resulting from my privileged identity.

While it would be inappropriate to suggest that my theoretical knowledge and reflexivity made me an insider, I felt that it was acceptable to occupy an initial in-between position according to Banks’s framework, based on an assumed closeness of my worldviews with those of the study participants. I believed that my theoretical understandings would allow me to build a bridge between my identity and that of the study participants. In spite of this cautious bridge-building, though, I remained acutely aware of my own status as the “Other” in a relationship that might be most accurately described as “dynamic otherization”. “The Other” in research is typically understood as “the object” of research conducted by white scholars on people of colour (Johnson-Bailey, 2004). Johnson-Bailey noted that

research about such groups, particularly research that endeavors to tell the stories of the “Other,” is treading the dangerous waters charted long ago by anthropologists and their predecessors, missionaries who were the emissaries of conquerors, who exoticized entire civilizations and used their writings to diminish cultures. (p. 137)

Inherent in the concept of “Other”, according to this definition, is a relationship of power that the researcher holds over those studied. I perceive this as a very one-sided interpretation of the notion of “Other”. In my personal experience, otherization was much more of an interactive process during which I frequently came to see myself as the “Other”, hence my preference to speak of dynamic otherization. Conducting my research in an environment where my study participants were the majority, and I the minority, helped me get a deeper understanding at the affective level of my previously predominantly intellectual notions of otherization.

In spite of her concerns, Johnson-Bailey (2004) did not negate the legitimacy of research carried out by externals, on the condition that the researcher worked as an advocate, used a compassionate lens, or attempted to present a legitimate message. In the context of these three qualifications, I derived authority for my research from a commitment to honest and legitimate presentation of the message resulting from my interactions with the study participants. My professional practice as an administrator in a university’s international affairs office has provided me with an understanding of and a deep-seated discomfort with the challenges posed by Western models of education that are increasingly following a market paradigm and economic prescriptions of cost recovery. This situation tends to further marginalize populations who struggle to gain access to education. I felt an acute need to explore, understand and distribute grounded knowledge, based on reported experiences with an alternative model that may contextually be more adequate to those left behind by the Western white-streamed education model.

My above reflections on otherization are by no means meant to diminish the existing global relationships of power. As a Western researcher located in North America, I have access to avenues of scholarly distribution of research results that are closed to many in the Majority World. Paradoxically, then, in a global environment where access to knowledge distribution channels is unequally divided, I may initially be better positioned to “tell the story” of my study participants than they themselves would be. In this context, I do not see myself as the primary storyteller, though, but rather as a conduit through which the voices of the people at the heart of my study can be heard. Although this role as intermediary provided me with sufficient authority to undertake the research, I felt that the product of my research ought not be an end in itself, but could only serve as a means to an end. Ultimately, I feel an obligation to hand over more ownership in this research to those at its core. At that point, I will only play a facilitative role as researcher, opening access channels and providing the necessary logistical environment for study participants to share their knowledge first-hand, without me applying my researcher’s filters. I have further elaborated on this point in the final chapter of this dissertation.

Finally, I derived authority for conducting the research from the early positive reactions of some future study participants. One of the administrators in Ghana noted when he first heard about my planned research, “I believe research in her area is worthwhile. What use is education which cannot be applied in your home country as the Canadian model is to most Africans who study there?” (Nsoah, administrator). Subsequent to my posting on the ESBEC.COM website, I received a number of encouraging messages, two of which are replicated here in excerpts: “I read about

research you intend to undertake ... it is really interesting for me and I don't have any problem to participate.... There are other colleagues who [I] am very sure will be interested in helping you for the research work" (Abdul, graduate); "I will be very happy if you can come to Ghana also to conduct this research. The majority of us are in Ghana and I will be very happy to have you here to see the real impact of the Cuban scholarship in Ghana" (Botwe, graduate).

In spite of the above assurances and justifications regarding the authoritativeness of my research, I never felt quite free of the slight unease of directing my intellectual curiosity towards something of which I was not a part. This is a dilemma which the external researcher will likely always find difficult to escape. I will now turn to discussing the other side of the researcher-participant relationship, the study participants' perceptions of my identity as researcher.

### **Participants' Perceptions of the Researcher's Identity**

I base the reporting of the participants' perceptions of my identity as researcher on two sets of observations: (1) the overt, such as the things that participants actually said with regard to my identity, and (2) the covert, that is, my own understanding of observations I made during the interviewing process, or interpretations that I deduced from verbal or other cues I received through third persons. Obviously, the second set is more subjective than the first one, and I would like to acknowledge at the outset the possibility of misinterpretation regarding this second set of observations.

With regard to the overt perceptions, one issue arose from my posting on the ESBEC.COM website. A question was asked as to whether I was going to turn my research into a book. This theme recurred during my visit to the Bahamas when I found

out that the Esbecans had actually for a long time discussed amongst themselves a potential book project about their experiences which had never gotten off the ground. Apparently, there was a concern that I had somehow found out about this project and had appropriated their idea. This issue illustrates a question asked by Johnson-Bailey (2004), “Who owns the story, the researcher or the participant? What happens when there is disagreement on interpretation or analysis?” (p. 138). The graduates were obviously concerned that I would not only steal their idea, but also their voices, and tell their stories through my own voice. I was able to dissuade such fears in personal conversations by explaining the nature of publications resulting from my research, providing assurance that these publications would not include a book written in a narrative style and sole-authored by myself. I was, however, grateful for this discussion because it laid the foundation for an idea that I have discussed in the final chapter of this dissertation.

Both in the Bahamas and in Ghana, there were speculations about my motivation to undertake this research; whether I was working for anybody or conducting the research on somebody’s behalf; who was paying for my research; and the nature of my relationship with the Cuban government. So many years after the program had officially ended, it seemed to appear odd to some of the graduates that anybody would want to undertake research on this topic without some secret or hidden agenda. In both locations, I owe a great deal in this regard to the local organizers who patiently acted as intermediaries between me and the potential study participants, raised the latter’s concerns and questions with me, and reported my responses back to them. The initial suspicions and concerns that I encountered have to be seen against the background of the graduates’ vulnerability, especially in the Bahamas. Only gradually and in the course of

my interviews did I start to understand some of the graduates' apprehensions. For example, it was reported to me in Nassau that shortly before my arrival there had been negative reports in the local media about Africans who had studied in Cuba, and who were now living in the Bahamas. Some graduates were therefore hesitant to speak with me because they feared that doing so might expose them to risk.

In regard to a longer-term perspective, several graduates appeared to carry emotional scars from the impact that their participation in the scholarship program had had on their personal and professional lives. Although this issue will be discussed in detail in the next chapter, it is important to mention here because the emotional and psychological baggage that some persons carried, and the discrimination that some of them had encountered, appeared to affect their perceptions of me as a researcher. The local organizers in Nassau and Accra thus almost took on the role of a "vanguard" whose task it became to investigate on behalf of others whether it was "safe" to speak with me. Such concerns were much more pronounced in Nassau than in Accra for reasons that are further explored in chapter 4.

Related to the general concern about my affiliations was a request made by the organizer in the Bahamas on behalf of several participants that I stay away from any kind of political questions or discussions during the interviewing process. I interpreted this request as meaning that I was to avoid topics which often surface in discussions of Cuba in Western media, such as communism, the Cuban government and the one-party state, and Fidel Castro, the supreme leader. This was unproblematic from my perspective because I was concerned with educational and development-related outcomes rather than political issues. However, several of the interviewees did cross over into political themes

during our discussions, partly because education and development are inherently political issues and cannot be separated from the way a state is organized. I understood this as a sign that the participants became more comfortable with me and my identity as researcher once they had had a chance to ask me questions in advance of the interview and as the interview progressed.

During a group meeting in the Bahamas, one of the participants actually openly asked me to elaborate on my political position in the context of the Canadian political landscape. It was not clear to me why the question was asked, but I answered it honestly and without any avoidance tactics. I assumed that the motivation for the question was related to the general interest regarding my position vis-à-vis the Cuban government and Cuban politics. Given my general stance and aspiration to minimize inequalities and provide an equal voice to participants, I was quite prepared to answer questions that felt uncomfortable or exposed me in any way. Throughout my research, I encountered situations where individual participants felt uncomfortable with or vulnerable in regard to certain questions I asked, and I considered it perfectly legitimate for them to ask such questions of me as well.

Other graduates dealt with their unease regarding my identity by agreeing to meet with me, but holding back responses to some of the themes contained in my questions. During one of the group meetings in Accra, I was challenged for not having sought and obtained formal approval from the Cuban side for my study, thus questioning my research ethics. My assurances that I had discussed my research with representatives from the respective Cuban departments, and that there was no requirement to obtain formal approval, did not seem to fully satisfy those who raised the concerns. Interestingly

enough, it was exactly the opposite issue that caused participants in the Bahamas some unease: They were worried that my research might be too closely linked with Cuban interests. This example illustrates well that there was no consistency with respect to the application of identity labels to me as researcher. Rather, perceptions of me appeared to be determined by a complex web of factors, including: graduates' life histories, perceptions of Cuba and the Cuban scholarship program, and peer relationships.

### **Data Generation Procedures**

In light of the issues outlined above with regard to the participants' perceptions of me, establishing rapport with the narrators became a crucial first step in the data generation process. In citing Spradley, Yow (1994) outlined "four stages in the interview situation: (1) apprehension, (2) exploration, (3) cooperation, and (4) participation" (p. 60). These stages were evident in most of the interviews I conducted, though not to the same extent. In some situations, participants very quickly moved towards cooperation and participation, and showed little apprehension or need to explore my motivations further after I had given an introduction to my research project. In most situations, all four stages were present. In very few instances, some level of apprehension appeared to persist throughout the interview such that cooperation and participation remained compromised and resulted in guarded responses.

Once participants were comfortable enough with the interviewing situation and I had answered all their questions about my research, the actual process of generating data proceeded on the basis of semi-structured interviews which I attempted to keep flexible enough to allow for depth, nuance, and complexity. In designing the questions that guided my conversations with the participants, and later in the interviewing process, I

made every effort to leave room for situated knowledge, depending on the contextual and intellectual dynamics of the interview setting. I used slightly different interview guides for different categories of participants: program graduates, administrators, and teachers, because these groups brought different experiences to the research puzzle. The interview guide for graduates in the Bahamas differed from the guide for Ghana because I made adjustments after the first set of interviews in March 2007. As is normal practice in qualitative interview studies, I did not always ask the same or all of the questions in the respective interview guide of all the participants in that category; neither did I necessarily ask the questions in a linear fashion. I made adjustments based on contextual considerations, such as the time each participant had available for the interview; their preparedness to talk in depth about their experience; the setting – individual or group interview; and their responses to previous questions. Analytical comparisons did not depend on asking all participants the exact same questions because my aim was not to generate data that were representative of a larger population (deMarrais, 2004; Mason, 2002). I also formulated follow-up questions during the interview process on issues that needed further probing.

I tested my first draft of an interview guide during Universidad 2006, a higher education conference organized by the Cuban government on a biannual basis. I had been invited to give an address and participate in a two-day roundtable on the Cuban scholarship program for students from other countries. The focus during the first day of the roundtable was on the current and former students' experiences, whereas the second day provided an opportunity for diplomats from the receiving countries to speak about their experiences with the program. The themes discussed focused my inquiry and

sharpened the research questions I ultimately decided to address with this study. I conducted some pilot interviews with students and administrators based on the preliminary interview guide I had developed in advance of the conference, supplemented by additional questions that emerged from the preceding roundtable discussions. The pilot interviews helped me discard questions that were irrelevant to answering my research questions, and pointed me towards new questions that I had not so far considered.

The interview questions that I formulated following the conference fell into two broad categories: descriptive and evaluative. The first set probed for detailed representations of the participants' involvement in the Cuban scholarship program, whereas the second set probed for critical reflection on their experiences with the program and the notion of development. The interview guides for the different participant categories are attached as APPENDICES B-E.

In spite of all these precautions, there were a few questions the importance of which only emerged gradually over the course of the interviewing process. For example, I started understanding over time that it was both important and sensitive to inquire about the graduates' home Region and their family's socio-economic situation. Especially in group settings, it was not always possible to ask and systematically record such information. I therefore had to write to the graduates again a year after the interviews took place to gather some additional demographic information.

Interviews occurred in a wide variety of settings. Throughout the interviewing process, I remained cognizant of the fact that my study participants had busy lives, and that making time available to meet with me meant giving up some free time during the

workday, in the evening, or on weekends. I tried to stay as flexible as possible and meet participants wherever it was most convenient for them. I met with participants at their workplace, in their private homes, in hotel lobbies, in public places such as restaurants, and in the guesthouse at the University of Ghana where I stayed during my visit to Accra.

I attempted to tape-record all interviews, with a few exceptions: In one case, I conducted a group meeting with a large number of participants which would have made transcription of the tape difficult. In a few other cases, participants explicitly asked to not be tape-recorded. In two cases, the area surrounding the meeting place with a participant was so noisy that tape-recording would not have been feasible. I also did not tape-record the one phone interview that I conducted. In all these circumstances, I took notes and transcribed the interviews from my notes.

Mason (2002) described how interviews can be read literally, interpretively, or reflexively. In as much as possible, I produced verbatim transcriptions of the interviews to remain faithful to my commitment regarding accurate presentation of the participants' own voices, rather than imposing my interpretations from the outset. Although the tape-recording and verbatim transcription technique was time- and resource-consuming, I felt that summary transcripts based on my understanding of the participants' utterances would have potentially skewed and falsified my data. Verbatim transcriptions were particularly important because interviews were conducted in English which is neither mine nor most of the participants' first language. Many of the participants first learned one of a number of vernacular Ghanaian languages as children and only started speaking English extensively once they entered school. Their use of English had been limited during their years in Cuba where the dominant language was Spanish. Based on their respective

language backgrounds, both the participants and myself had idiosyncratic ways of expressing ourselves, and verbatim transcripts provided me with an opportunity to check for potential misunderstandings that would have likely found their way into my data, had I relied on simply capturing the substance of what people said. Only the very literal transcription of the interviewees' own voices allowed me to draw interpretive and reflexive conclusions.

Susan Chase's (2005) work further corroborated the need for literal transcriptions. She pointed to the importance of the research relationship between narrator and listener in qualitative interview-based studies. Viewing the participants as narrators "with stories to tell and voices of their own" (Chase, p. 660) was of critical importance to me. Without giving the appropriate space to the participants' stories before starting to impose my own interpretations would have compromised the richness of emerging data.

While I engaged in my first interviews in the Bahamas, I made a point of listening to each interview after it was conducted to determine whether there were patterns in my interviewing style that acted as barriers to a well-flowing qualitative interview (deMarrais, 2004). I also tried to remain aware of my values, assumptions, beliefs, biases, and potential misperceptions that all qualitative researchers inevitably bring to the data generation process. In doing the tape checks every night, I attempted to detect how these personal dimensions interfered with the interviewing process, and I made adjustments in subsequent interviews to minimize any manipulation of the participants by me as the researcher. After my return from the Bahamas, I synthesized my learning about the interviewing process by making changes and adding to the interview guide for graduates. I subsequently used a revised guide in Ghana. Due to the tight schedule in Accra, I was

not able to review the tapes on site; however, I felt that the revised guide and my enhanced understanding of my research topic based on the conversations in Nassau allowed me to conduct meaningful interviews without constant tape checking. I created a running list of interview participants where I recorded, after each interview, the most pertinent information about the participants, including the year they went to Cuba, program studied, current profession, and any other information I deemed relevant.

Transcription of the tapes proved challenging at times due to multiple sources of interfering sounds. Fans and air conditioning systems that emit a humming sound are omnipresent in hot climates like those of Ghana and the Bahamas. Shutting off these cooling devices would have exposed the participants to an undesirable level of discomfort. Alternatively, opening the windows cut down on inside noise, but picked up all the sounds coming from the outside. In spite of these challenges, most tapes were well audible, with the typical gaps resulting from trailing voices or short sound disruptions. Unfortunately, one of the interview tapes involving a group of four graduates turned out to be inaudible due to some interfering noise, most likely from the fan of a computer system that backgrounded the voices of the participants. I tried to salvage this tape with the help of a sound technician, but even with digitalization techniques it was impossible to improve the quality to a level that would have permitted a transcription of the interview. The experiences of those graduates are, however, included in this work based on my recollection and the unique contextual setting in which the interview took place.

Gaining the trust and confidence of the participants became a key theme in the interviewing process. As indicated earlier, the perceptions, assumptions and uncertainties regarding my identity as a researcher posed a challenge to building the necessary trust

and confidence amongst the participants that allows for open and free-flowing dialogue. The participants' interactions with the two organizers in Nassau and Accra constituted the first level of trust-building procedures. The organizers answered all the preliminary questions by prospective participants so the latter could decide as to whether it felt safe enough to meet with me. I had provided the organizers with the research consent form which set out the purpose of my study, for sharing with prospective participants. I started each interview explaining in more detail the background to and purpose of my study, and invited questions from the participants. In some cases, this preliminary conversation before I started any tape recording lasted for up to one hour. Most participating graduates asked very detailed and poignant questions about my research. The majority of questions seemed to assess as to whether I was honest and could be trusted. For example, one participant asked me what assurance he had that what I said I was going to do was actually what I was going to do. How would he know that I was going to destroy all raw data once my dissertation was completed, as I stated in the consent form? I explained that I was bound by my institution's ethical guidelines, and that any violation of research ethics would have very negative repercussions for me. I conceded that, in the end, all I could give as an "assurance" was my word. The participant appeared content with this response, and the interview proceeded in an open and pleasant atmosphere.

There were a few cases where I was unable to dispel participants' concerns, which resulted in a somewhat compromised interview situation. In one group interview, I was asked to refrain from tape recording, and participants answered only a small number of my questions. The level of unease in that group was so high that participants only agreed to sign the consent form using a coded numbering system that allowed them to not write

their name on the form. In that particular case, strong group dynamics were at work with one participant controlling which questions to answer and where to decline a response.

There were also a few situations in which participants did not openly raise concerns, but where I could clearly sense some reservations with respect to certain questions, and where I felt that the respondents provided guarded answers.

There were advantages and disadvantages to conducting group sessions versus individual interviews. Some of the group sessions resulted in very rich conversations because participants did not only respond to and react to my questions, but also interacted amongst each other. Groups of three to six persons seemed to work best in that regard. Larger groups proved to be more challenging in terms of managing the communication. In larger groups, one or two people typically started to act as spokespeople for the others which resulted in a limited number of persons providing the bulk of contributions, whereas others needed to be explicitly invited to “take the floor” and make a contribution. Large groups also provided a challenge to me as researcher, in particular if I could not tape record and had to take written notes, while at the same time facilitating the discussion and ensuring that everybody got a chance to speak.

The assistance of the local contacts/organizers was vital for the data generation process. Not only did the organizers assure graduates and other study participants that my mission was legitimate in advance of meeting with me, but they frequently also introduced me in person to a particular participant or group of participants, and in some cases stayed throughout the ensuing interview. It is in large measure thanks to the local organizers that the majority of interviews took place in an open and constructive atmosphere.

Apart from the interviews, I collected one other set of data when I visited ESBECE #22 on the Isle of Youth in February of 2008. The Ghanaian students drew pictures and wrote some text on many of the classroom walls. The drawings fall into different categories: some are related to specific study areas like mathematics, physics, or literature; others relate to the school's natural environment, especially the abundance of birds; political themes constitute a third category; and a fourth category is made up of drawings related to the use of particular rooms such as bathrooms. There are also a number of drawings whose contextual link is not immediately apparent. I photographically documented these drawings to ensure that they are not lost because they will inevitably disappear over time as the school's structure further deteriorates.

### **Validity of Data Generation Procedures**

Mertens (2005) noted that “methodological validity concerns the soundness or trustworthiness of understandings warranted by our methods of inquiry, particularly with reference to the measurement instruments, procedures, and logic of inquiry” (p. 77). Consistent with my paradigmatic stance, I regarded interpretive interviews as the most appropriate method to ensure validity of the data generated. Because I was primarily concerned with the participants' personal experiences with, reactions to and conclusions drawn from their years of study in Cuba, careful illumination of these dimensions seemed to be the most reliable way of generating data to help me formulate responses to my research questions.

As noted above, verbatim transcripts were one approach by which I aimed to prevent myself from prematurely imposing my own interpretations on the participants' voices, thus ensuring the validity of my raw data. Once I had transcribed the interviews, I

e-mailed the transcripts to the study participants for member-checking. With the exception of a few cases where e-mail addresses I had been given were not in service, the majority of participants received their respective transcripts. Several participants responded either with minor changes or additions to the transcripts, whereas others simply thanked me for their transcripts without requesting changes or clarification. A considerable number of participants did not respond to receiving their transcript. I interpreted this as meaning that they either felt comfortable enough with the interview to not feel a need for reviewing the transcript, or that they reviewed the transcript and had no changes or comments to suggest.

The inclusion of different subsets of populations in the sample – graduates living in Ghana and abroad, former program administrators, and teachers – provided for representation and the possibility of dataset triangulation of reported experiences, and minimized the likelihood that data would be skewed in a particular direction. I expected the reported life experiences to be sufficiently diverse to provide me with the varied descriptions that I was seeking. Including different population subsets was of particular importance in light of the fact that the participating graduates were reflecting back on events that, in some cases, spanned a long period of time, starting in their childhood.

I paid particular attention to this oral history component of my research because the narrative study of lives poses some challenges with regard to validity. I expected that the graduates' reflections on certain events would have to be seen through the filter of time because remembering "historical" life events can be fraught with difficulties. What we regard as important when we are children differs from what we regard as important when we are adults, and certain events or aspects of our childhood life can be distorted in

proportion once we apply our adulthood filters. As one of the graduates observed when he returned to the Isle of Youth a few years ago for a visit and happened upon somebody he knew from back then, “I thought the years had made him shrink... I used to see him as a real GIANT!” (Sai, n.d.). Some level of inconsistency in participants’ accounts was thus an expected feature of my research, rather than signalling a lack of data validity.

Mertens (2005) noted that recorded interviews are an appropriate method of approaching people’s biographical accounts or life stories. According to Yow (1994), oral history can provide answers to questions that are not available through other channels by giving access to information that has not been recorded in written format. Oral history research has limitations: Ritchie’s question of whether oral history is limited by the fallibility of human memory (as cited in Mertens, 2005) is of particular relevance to this study. Ritchie observed that human memory is selective and constructive, and thus it cannot be expected that any two persons will give the same account of an event that occurred a long time ago. Recognizing these faults of human memory, Yow (1994) cautioned that particular attention ought to be paid to consistency in the testimony and accuracy in relating factual information when analyzing data based on persons’ narrative accounts of their life. Yow suggested to check accuracy by consulting other sources and comparing accounts, and to deal with inconsistencies by asking for clarification from participants. I kept these limitations in mind throughout the data generation process by comparing different participants’ accounts of the same events and by checking for inconsistencies as the interviewing process progressed. I asked additional probing questions where I observed inconsistencies. As far as possible, I consulted some written data sources, in particular the journal *West Africa* and a number of reference books on the

political history of Ghana, regarding the general political and socio-economic conditions prevailing in Ghana at the time when the Isle of Youth program took place.

However, because most of my research was concerned with the present-day implications of historical events, the oral history challenge was not as much of a problem as it tends to pose in purely historical research. Inasmuch as graduates' perceptions of the program were concerned, it was more important for me to understand how their present-day perceptions, whether skewed by the time lens or not, were impacting their lives. In cases where I wanted to specifically draw out the perceptions they had about something at some point in the past, I very explicitly asked the question in a way that made it clear I was trying to get them to relive a moment or an event in the past and to remember what feelings, emotions and thoughts they associated with that moment or event back then.

The next two sections describe how I proceeded with the data analysis, in particular in light of the challenges posed by the oral history dimension of my research.

### **Data Analysis Procedures**

Mason (2002) noted that qualitative data within a constructivist paradigm need to be read in an interpretive manner by which the researcher goes beyond the literal reading of interview data and considers what certain data might mean, and what the researcher thinks can be inferred about the interview interaction. Data interpretation and analysis are ongoing processes that Mertens (2005) described as recursive; that is, findings are systematically and comprehensively generated as the interviewing process evolves. I have already alluded to the fact that I paid attention to the recursive nature of my research by adjusting the interviewing process after I returned from the Bahamas. Although I did not do any formal data analysis at that point, I argue that the first, unstructured level of

data analysis takes place in the researcher's mind as she transcribes interviews and reflects upon the data during the transcription process, thus creating mind maps of data.

After finalizing all transcripts, I started the manual coding process at the first level. I decided to not use any computer software to assist me in the analysis. Although the manual analysis and inductive coding proved to be very time-consuming, I felt that it was more faithful to my overall epistemological stance because I was afraid that a computer-assisted analysis might lead to missing out on some nuances within the data. I printed off all transcripts and colour-coded the emerging themes and subthemes. The descriptive coding list I generated at the first level contained the following themes: historical context Ghana; description of Isle of Youth program; students' families; selection of students; work and study program; postsecondary programs in Cuba; reintegration issues - accreditation, culture, language, employment, perceptions of Eastern Bloc education; relevance of curricula; gender issues; altruism/humanitarianism; politics; colonialism; development; brain drain; and lessons learned/missed.

At the same time as I colour-coded the themes, I also took notes on the passages that I highlighted in the text, sketching out emerging patterns. I then assigned pattern codes and created a comprehensive matrix of descriptive and pattern codes, with descriptive codes arranged at the top of the columns, and pattern codes along the left-hand side of the rows. I then inserted the comments I had made while coding my data into the cells where the respective descriptive and pattern codes intersected. Descriptive codes consisted of, for example, themes around reintegration (accreditation, culture, language, employment, perceptions of Eastern Bloc education), whereas pattern codes contained

cross-cutting themes such as discipline, planning and program design, Cuban educational philosophy, and links between study, work, and society.

Grouping the data in this way allowed me to discern and connect themes that I had generated under different first-level and pattern codes, but that stood in some relation to each other. This process allowed me to pursue the analysis on a deeper level by revealing how the different themes associated with my research were interrelated, what causal relationships existed between them, and what inferences could possibly be drawn from the data, thus starting to group “disparate pieces into a more inclusive and meaningful whole” (Miles & Huberman, 1994, p. 58). The matrix presented a visual aid for me to see similar, recurring and conflicting patterns, and to create clusters of patterns that appeared conceptually related. I noted beside the respective themes the frequency with which they had occurred, thus giving me an indication as to the patterns with which the participants seemed most concerned. As Miles and Huberman explained, although qualitative research is primarily concerned with qualitative rather than quantitative judgments, it is important to keep track of and isolate “something that (a) happens a number of times and (b) consistently happens in a specific way” (p 253). These are essentially quantitative statements based on counting, expressed in qualitative terms. I also felt that it was important to keep track of numbers in order to identify and account for unusual patterns that might have only come up with one or two participants. This is not to suggest that “breakout” patterns, or “outliers”, should be discarded; quite on the contrary, they might provide very useful insights into themes that other participants did not want to mention, and analyzing the potential reasons why these themes were not mentioned by others

could open up a whole new set of inductive codes. However, the frequency of emerging patterns is important in light of generalizability considerations.

The matrix was of special importance in light of the challenges presented by the participants' historical accounts. It afforded me a tool to easily cross-reference different interviewees' descriptions and detect inconsistencies. I followed the advice given by Mertens (2005) on critically evaluating historical-narrative research. In the absence of extensive documentary and historiographic resources, I had to rely mostly on internal tests of corroboration and explication of contradictions. The scope and volume of data were sufficient to allow for the employment of these methods. Of particular value in this regard were group sessions during which participants debated and challenged one another on diverging accounts of historical events or perceptions thereof. The task for me as researcher was to distinguish between different perceptions amongst participants of what was essentially the same event, and factual differences regarding related and recurring events, but that might have been experienced by participants in different years and against a different socio-political or otherwise dissimilar background.

The above discussion describes the formal steps I undertook to analyze my data. I should also note that the formal analysis was preceded by a more informal process of data reduction. Miles and Huberman (1994) explained that data reduction is an ongoing process which takes place throughout the life of a project or study, from the early, conceptual stages until after the respective report has been completed. There are times during that process when researchers think more consciously and purposely about their data than at other times. After finishing my field work and the interviews, but before finalizing all transcripts or starting the process of analysis, I wrote a discussion paper for

a conference on preliminary findings resulting from my research. This constituted my first attempt at data reduction because I had to make decisions about which data to conclude and which to omit, and what kinds of conclusions to draw in a preliminary fashion.

I proceeded with the data reduction by looking for thematic patterns and included data that were related to an emerging pattern, albeit not necessarily always following that pattern, thus providing an array of data – whether conflicting or consistent – that could be grouped together. I omitted most themes that emerged as isolated items and did not show up on at least a number of occasions in my data. In the subsequent, more structured process of data coding, I re-inserted several of those isolated items to ensure that in my preliminary analysis I had not overlooked an existing relationship with other patterns. However, the initial data reduction process served to create a hierarchy of themes that appeared more or less pertinent to answering my research questions. This method allowed me to order my thoughts and to create a mental pyramid of higher-ranking, lower-ranking, and marginal themes.

Miles and Huberman (1994) stressed the role of the writing process itself in the context of discovery. They argued that “writing, in short, does not come after analysis; it *is* analysis, happening as the writer thinks through the meaning of data in the display. Writing is thinking, not the report of thought” (p. 101). Writing the conference paper served exactly that purpose: It enabled me to carefully think through my data for the first time in a semi-structured way, drawing on transcripts and my mind map of data, thus helping me create some initial categories of first-level codes which subsequently informed the more structured process of data analysis.

### **Validity of Interpretation**

In assessing the validity of their research report, researchers ought to consider questions of internal and external validity. Internal validity refers to the truth value in the presentation of research findings, whereas external validity refers to the extent to which research findings have broader meaning and can be transferred and generalized to other contexts (Miles & Huberman, 1994). Miles and Huberman suggested that both internal and external validity can be queried along a number of dimensions. With respect to internal validity, I regard the following dimensions outlined by these authors as the most important ones in the context of this study: (1) context-richness in descriptions, (2) internal coherence of findings and systematic relationship between concepts, (3) inclusion of negative evidence and consequences, and (4) due consideration to rival explanations.

I have ensured context-richness in descriptions through the chosen sample size, choice of two distinct locations for data generation, the nature of the interviewing process, and the transcription process. Interviewing a total of 56 participants in a variety of group and individual settings in Ghana and the Bahamas, and, to a lesser extent, Canada, provided for the diversity in background, experiences, interpretations, and opinions that are necessary for obtaining meaningful descriptions. The interviewing process itself was detailed, and I transcribed the interviews as close to the participants' own words as possible, resulting in comprehensive accounts by the participants. One caveat in this regard was the inability to go beyond single interviews and speak with study participants a second or a third time. Regrettably, the resources at my disposal did not allow for such a process.

I carefully examined the emerging themes and concepts with the aid of a coding matrix as described above. This process allowed me to visually detect areas where the themes and concepts did not appear to be coherent, to easily identify outliers, and to pay attention to these divergences. In several cases, the apparent lack of coherence led me to understand new relationships between data points that I had previously overlooked. In some cases, the outliers proved to be memory lapses brought about by looking at historical events that happened 15-20 years ago. I tried to stay mindful of the fact that I was dealing to a considerable degree with retrospective evidence. Yow (1994) cited research by Rubin that indicated an improvement in memory regarding events during childhood and adolescence when people enter their 40s and 50s. None of the participating graduates were of that age yet, so their memories might have some gaps and faulty recollections. On the other hand, it has also been shown by psychologists that non-trivial events, incidents that affect somebody's life in major ways, and memories of events that invoke strong feelings, tend to have a high rate of recall (Yow). There was clear evidence throughout the interviews that the events around the Isle of Youth program fit into this high-recall category. For example, I was astounded to find that almost every participating graduate answered my question about the year they went to Cuba with the exact date – day, month, and year - they arrived in Havana. The factual inconsistencies I encountered were few enough in number and scope to lead me to conclude that the significance of the events we were discussing in the interviews limited the impact of recall lapses. Also, because we were looking at factual evidence through the lens of the contemporary context, Yow very aptly observed, based on communication with Adams, that “ some

‘facts’ have a shared reality with multiple means of verifying their facticity, no matter their interpretative frame” (p. 21).

Over the course of the interviews, and after adjusting for the potential effects of the retrospective gaze, it became apparent that the participants’ accounts did not all point in the same direction to make the formulation of consistent relationships an unambiguous process. I encountered negative evidence and made an attempt to fairly represent such evidence against the background of the predominant emerging trends. Negative evidence did not negate the validity of my conclusions; rather, it showed that although there were a number of clearly discernible trends, the complex relationships that I investigated through this study could not be reduced to law-like theses in a positivistic sense. For example, female participation in the program was a contested issue. Although most accounts pointed in a certain direction as to why the program ceased to accept any girls mid-way through the life of the program, there were dissenting voices which denied that a decision not to accept any more girls had been made.

Throughout the process of research design, interviewing and data generation, and data reduction and analysis, I tried to remain as self aware as possible, particularly of my own biases that I brought to the research. I attempted to search for multiple meanings of the patterns I observed and to not jump to quick conclusions based on the first possible or the most obvious explanation that came to mind. When more than one explanation appeared plausible, I carefully considered the rival explanations and chose the one best supported by evidence as the most likely one. However, if the evidence was not conclusive, I let rival explanations stand with equal validity. Although this practice

introduced some ambiguity into the findings, I felt that it was more truthful than forcing an explanation for which conclusive evidence was lacking.

With respect to external validity, I examined my data analysis and interpretation process along the following dimensions: (1) rich characteristics and diversity of sample to permit comparisons with other samples in future research, (2) unambiguous preservation of narrative sequences, (3) possibility of further testing in other settings, and (4) congruence and connection of findings with prior or emerging theory.

As shown in Tables 2 to 5, my sample was diverse in terms of the graduates' Region of residence when they applied to the program, the year they arrived in Cuba and the year they graduated, disciplines they studied, and gender (to the extent only that gender representation was a consideration in the program). Given that all nations represented in schools on the Isle of Youth are likely to have had similar arrangements with Cuba as Ghana, I expect that a similar sample could be constructed from a different population, for example from another country's graduates who participated in the Isle of Youth program.

Preserving the participants' narrative sequences without obscuring their utterances was of particular concern to me. I therefore used verbatim transcripts, where feasible, and replicated the most salient quotes in the research report. I chose quotes that summarized well the findings that were consistently observed across the interviews. This constant process of re-reading and reflecting back on my data allowed me to gradually support emerging tendencies applicable to the study.

Given the exploratory nature of this study, there is considerable potential for further studies and testing in different settings. The obvious choice for further studies would be

with other recipient countries that had a similar scholarship arrangement with Cuba. Studies of this nature would allow for an increased level of generalizability of findings beyond the particular Ghanaian experience. Another possibility for further testing would be a longitudinal study: following some of the participants in the present study over a period of up to 10 years to determine what kinds of changes happen during that timeframe, and how this longer timeframe may affect the impact of the Cuban scholarship program on the graduates and the societies in which they live.

Finally, in regard to congruence and connection of findings with prior or emerging theory, my research questions explicitly addressed some of the theories regarding brain drain and South-South assistance within the context of postcolonial environments. This focus on the theories presented in chapter 2 featured prominently in the questions contained in the interview guides and consequently informed much of the discussions during the interviewing process. Any findings supporting existing theories were reported as such. I presented findings that contradicted existing theories as empirically grounded information that has to be assessed within the narrow confines of this study and that points to a need for further study.

I shall now discuss the limitations of the study separately because they potentially have a major influence over external validity.

### **Limitations of the Study**

The study was subject to a number of limitations arising mostly from the sampling strategy that I employed. I identified the study participants in Ghana and the Bahamas with the help of local organizers through a snowball/chain procedure, with participants self-selecting for my study once they had been informed about it. This approach

guaranteed that participants were genuinely interested in my study and willing to make an active contribution; however, I might have missed out on some negative evidence because potential participants who could have presented such evidence might have opted to not participate, or might not have been contacted by the local organizers. As Yow (1994) reminded us, it is often the very articulate who volunteer to be participants. Including the less enthusiastic may have resulted in different narratives.

The contextual nature of the interviews and the emerging themes assured me, however, that systematic or systemic bias was at least not present with respect to experiences reported and views expressed by participants. The diversity of themes and patterns that surfaced proved that the sampling strategy had been successful in yielding a qualitatively meaningful cross-section of Ghanaian program graduates and former program administrators with rich information regarding my research topic. It is entirely possible, though, that inclusion of less forthcoming narrators might have led to a somewhat different emphasis with regard to dominating themes.

A second limitation related to sampling arises from the dearth of participants in rural areas of Ghana. Due to the local organizer's location in Accra, all the Ghana-based study participants resided in the larger Accra area, including Tema. It is likely that the local organizer had less information about graduates in more remote regions. It would also have been difficult to reach these graduates because many rural areas in Ghana do not have Internet connectivity, and graduates in those regions could therefore not have been reached by email. It is conceivable that participants in rural areas could have made rich contributions to the study, in particular with regard to the question of how their Cuban education had prepared them for work in this type of environment. It can also be

expected that they would have been able to share unique insights into development-related issues. Given the communication challenges, the logistical difficulties, and the financial boundaries within which I had to conduct this study, inclusion of rural participants was not feasible. An attempt should be made, however, to include a rural sample in any follow-up study.

A further limitation relates to potential participants living and working in the industrialized countries of the world. A sizeable number of graduates live in the Minority World, with clusters found in the U.K. and U.S.A. Apart from the few participants I interviewed in Canada, inclusion of more graduates in the North would have added further perspectives on various dimensions of the research, especially the discussion around brain drain or brain circulation to Western countries. Following the posting on the [ESBEC.COM](http://ESBEC.COM) website, I communicated by e-mail with a number of these graduates. Unfortunately, the logistics and finances involved in traveling to the countries and different cities where graduates live proved prohibitive. I considered interviewing these graduates over the phone, but discarded this thought because it was not in line with my ontological position and epistemological approach. Telephone interviews do not allow for the same level of trust and confidence to develop between researcher and participant, they tend to be much shorter and result in shallower data sets compared to in-person, in-depth interviews. After conducting one telephone interview with a graduate residing in Canada to test this type of setting, I discarded the idea of further telephone interviews since I felt that this process would have compromised rather than aided the study.

The study was also limited by my inability to conduct more than single-time interviews. It would have been preferable had I been able to talk with all participants at

least a second time after giving them a chance to review their respective transcripts. A second interview would have provided an opportunity for further discussions and clarification of concepts that may have remained unclear after the first conversation. The logistics of this study and the need to travel did not allow for second-time or third-time interviews.

In one of the group interviews, peer intermediation acted as a control mechanism that inhibited the free flow of conversation by all participants. In terms of content, data generated from this interview setting were limited. However, the contextual situation was of interest to the study: The types of questions that the group decided not to answer reinforced the highly politicized atmosphere in which the program took place and which was still present 11 years after the Isle of Youth program had ended.

Finally, some limitations to the study resulted from the particular linguistic situation between researcher and participants. The interviews took place in English, but, as I noted earlier, for several graduates this was not the language in which they felt that they could most comfortably express themselves. For many, that language would have been Spanish. I personally speak English with a slight German accent with which most participants would not have been familiar, and it is possible that this also impacted some of the study participants. It is possible that, in some instances, the depth of data was somewhat compromised by the linguistic circumstances, although I consider such limitations to be negligible. I tried to encourage well-flowing conversations and focused on the meaning of words, rather than form. If I felt that I was poorly understood, I rephrased my question and broke it out into smaller components that could more easily be comprehended.

Any generalizations derived from this research are bounded in scope by the study's limitation to the Ghanaian context and the fact that the sample was constructed through a snowballing technique, rather than through a representative sampling approach. Generalizations to other countries that had similar arrangements with Cuba would be inappropriate because the political, cultural, social and organizational circumstances impinging upon the graduates' experiences might be completely different in other countries. The generalizations presented later in this study are of an analytical nature whereby I have aggregated findings across individuals' experiences to construct a set of trends from the results of this study (Mertens, 2005). I have made every attempt to discuss these trends within the limited context of the study participants and not to generalize to the larger population of program participants.

## **Chapter 4 – Results and Interpretation of Data**

### **Philosophy behind and Characteristics of Scholarship Program**

The Cuban scholarship program was, in many ways, the antithesis to Western scholarship programs set up by former colonial powers in capitalist countries. The agreement between Ghana and Cuba, just like Cuba's agreements with a considerable number of other countries, was an early example of the type of micro-level bilateral arrangement for building capacity and knowledge in lower-income countries, as called for much later by the United Nations (2004) under NEPAD.

After the Rawlings government took power in Ghana at the end of 1981, Ghana's Commission for Economic, Scientific and Technical Co-operation was in charge of investigating the country's relationship with communist countries. The government decided to accept Cuba's offer for a scholarship program created in memory of African revolutionaries, in this case Kwame Nkrumah, Ghana's first post-independence president. According to one administrator interviewed for this study, the Ghanaian education system in the early 1980s was not well developed: In a country with a population of about 12 million in 1983, only three universities and three polytechnical institutions existed at that time; in some rural areas, there were neither primary nor secondary schools; and tuition fees, particularly for boarding schools, were prohibitive for the poorer strata of society. As pointed out earlier, the UNESCO made a number of recommendations in the early 1980s that were incorporated into the Ghana-Cuba assistance program: aligning educational efforts with

- African nations' economic and socio-cultural development;
- the predominantly agricultural structure of most African nations;

- the world of work through curricula that include work study opportunities.

One administrator explained how the Ghana-Cuba program served as a test case for these prescriptions, in particular because the offer came at a time when Ghana was trying to reform its school system and place more emphasis on practical over theoretical work through the introduction of junior secondary and senior secondary schools. “We took advantage to then establish the school, and use it to test the UN prescriptions on work/study program – that is what they were recommending for majority countries. So that is why we took part in it – not for any other thing” (Razak).

According to the administrators and teachers I interviewed, the program details were based on the needs of Ghana at the time. The most pressing human resource needs with respect to the country’s economic development were seen to exist at the middle technical level for which vocational training was a prerequisite. Postsecondary career choices were thus negotiated accordingly, as I explain in more detail later. At the secondary level, curricula in ESBE #22 were co-taught by Ghanaians and Cubans in order to provide students with the benefits of the perceived excellent Cuban science education, while also keeping them in touch with their home country through teaching them Ghanaian culture, history, geography, as well as English.

Despite my best efforts, I was unable to locate any concrete statistical data on the number of Ghanaian students who went to Cuba under the Isle of Youth program. However, one administrator recalled in detail how many students went every year: the first group of 609 went in 1983. This was the largest single group ever sent since grades 7-9 at the secondary level had to be filled, as well as grades 10-12 at the pre-university level. After that, an average of 120 students was sent during each of the years 1985, 1986,

1987, 1988, and 1989 (no students went in 1984 since the students sent in 1983 started with one year of Spanish language training before attending subject classes at the respective levels). According to these figures, the total student intake over the life of the program would have been approximately 1,200 students. These figures were corroborated by the graduates I interviewed in terms of the size of the group of students with whom they went to Cuba, and the fact that nobody stated having gone to Cuba in 1984. In fact, the ESBE.com website does not list any student who provided 1984 as her or his intake year.

A major defining characteristic of the program with implications for several issues examined in this study was the fact that very few students had the opportunity to return home to Ghana for visits while they were studying in Cuba. Only 10 students every year were selected on a merit basis for a home visit to Ghana, and none of the former students I interviewed were among those selected. There was consensus among all those interviewed that this situation created a hardship for the students who lived away from their home country and from their families for up to 15 years. The majority of graduates and all administrators and teachers indicated that no promises of return visits were ever made to the students before their departure, although some of the graduates were under the impression at the time that such an assurance was given. A few graduates insisted that a promise to this effect was made during the orientation session. Because they were children or young teenagers at the time, it is conceivable that they misunderstood the information provided about return visits. Such visits were restricted to a few students each year who were selected based on their academic and practical work performance, and their general comportment, as assessed by the Ghanaian and Cuban teachers. The

former program administrators explained that the reason for this policy was a lack of funding on the part of the Ghanaian government. Cuba was financially responsible for providing the school infrastructure and the majority of teachers, food, clothes for students, and other necessities of life. Ghana, on the other hand, was responsible for all transportation between the two countries and for providing Ghanaian teachers for a number of subjects. Ghana also provided a small stipend to the students. In the absence of government funding to allow for students to visit Ghana every so many years, students' parents also did not have the economic means to bring their children home for a visit. Although some graduates understood these financial constraints, several respondents criticized the fact that the Congolese government apparently financed visits home for their nationals every so many years and questioned why the same was not possible for Ghana. Some parents' representatives from the regional POSICAs (Parents Of Students In Cuba Association) came for visits every year to check up on the students, but not all parents were involved. In some cases, there was little or no contact between students and parents throughout the students' time in Cuba.

At any given time, the student population at ESBEC #22 was kept at a steady state of about 600. The Ghanaian representative on the Isle of Youth, the school headmaster, and the Ghanaian and Cuban teachers were in charge of this large number of youth – a formidable task, given that the students dealt not only with the absence of their parents and immediate families, but also with issues of homesickness, integration into a different culture and language, and the usual challenges experienced by adolescents. Because it was difficult for these few people to constantly be available for the students, a mentoring system between the students emerged organically by which seniors in higher grades

looked after younger ones and protected them from bullies. The result of this high degree of independence compensated by inter-student support created an atmosphere described by several graduates as “one big family”. Students quickly learned to be self-directed, analytical, and to produce things on their own that they were lacking. However, one graduate conceded that this independent style was more challenging for those students who seemed to need more guidance.

There was practically consensus amongst all interviewees that the program on the Isle of Youth provided a truly internationalist, unifying experience not only for Ghanaians from different ethnic and cultural backgrounds, but also with students from other African nations and with the Cuban local population. Intercultural festivals involving all African schools and Cubans took place on an annual basis, along with frequent intercultural encounters and sports activities involving students from different African nations. As one graduate described it, “that really was the kind of experience that led to becoming conscious of different people, different traditions, different food, as people tried to exhibit what they are, their tradition and culture. ... it was like, to unify, to bring unity to some of these nations” (Kweku). The teachers also commented on this issue, pointing out that without the interference from parents, students from all ethnic, geographic and socio-economic backgrounds were treated equally, that the program had a unifying and levelling effect in that regard.

The Isle of Youth program went through two distinct phases – pre-1990 and post-1990. With the disintegration of the Soviet Union and the cutting of any economic and financial support for Cuba, conditions in ESBEC #22 were reported to have become more challenging: “Life, life in Cuba. It was bittersweet. We had good times, and then, things

changed...” (Etse, graduate). Even in the 1980s, the conditions in the school were seen by several graduates as harsh, in particular with respect to discipline. Some graduates commented on the perceived “military” or “draconian” rules, but they also acknowledged that such rules were necessary to deal with the large number of adolescents in the absence of parental guidance. Perceptions of the Cuban living standard depended on the Ghanaian students’ background: Those coming from rural Ghana perceived the Cuban standards as higher, whereas Ghanaian students from more privileged backgrounds and mostly from the urban centres were used to a more comfortable standard of living compared to what they found in Cuba. Regardless of what they thought about the program during their time in Cuba, the majority of graduates who participated in the study agreed that the Isle of Youth program, and later their postsecondary studies, had prepared them well for life and had taught them to deal with any situation they encountered later in life.

In spite of the long absence from home, the challenges created by that situation, and the economic difficulties experienced in the 1990s, the dropout rate for the program appears to have been low. Those students who left the program prematurely were typically forced to do so for a variety of reasons. As various administrators explained, a few students were pulled out by their parents; some were repatriated on disciplinary charges; several female students were sent home to Ghana after they became pregnant; and there were a few cases of psychological problems and illness. The sense of isolation became an issue over time, especially for some students who went on to polytechnics on the Isle of Youth and thus spent their whole time in Cuba on the Isle. Although they mixed with other nationalities, including Cubans, in the polytechnics, they remained in the geographically isolated setting of the Isle. Graduates, administrators and teachers

agreed that some of these problems were inevitable under the circumstances. The students found themselves in an unfamiliar, culturally very permissive context that clashed in many ways with the environment in which they had previously lived. The lack of a psychologist who could have helped the students work through some of the challenges they encountered was pointedly noted by graduates, teachers and administrators. In some cases, students apparently went back home to Ghana after they had finished their secondary education on the Isle of Youth. One program graduate reported that out of the 97 students who went to Cuba in his year, six went back home after completion of their secondary studies. The remaining 91 students went on to universities or polytechnical institutes.

Although the program certainly had shortcomings in these and other areas, it was nevertheless felt by most of the interviewees that the program, upon its inception, had the full support of the Ghanaian government. One graduate noted that “we are the children of that government, we are the fruits of that government” (Kweku). There was also consensus among those interviewed that the government ideologically abandoned its program support during the 1980s while the program was still underway, and the reasons for this development are laid out later in this chapter. As noted in chapter 1, the program technically ended in Ghana with the last student intake in 1989, and ESBEC #22 was closed down in 1996 after the last students had moved to the postsecondary level. The reasons provided as to why the program closed down were mixed. The majority of the former students were of the opinion that the disintegration of the Soviet Union and the resulting economic difficulties in Cuba did not allow the Cubans to provide generous scholarships and material support to thousands of students any longer.

Three administrators agreed that the economic changes in Cuba as the result of Gorbachev's policy of *glasnost* and *perestroika*, which ultimately led to the dissolution of the Soviet Union, were primarily responsible for the discontinuation of the Isle of Youth program. One administrator argued that this was not the principal reason in 1990; rather, Ghana at the time tried to renegotiate the program and rebuild it in Ghana with the support of Cuban teachers. However, for reasons that are not entirely clear, this repatriation of the program never happened, and the original program was not extended, either. According to this administrator, the reasons for discontinuation thus lay as much with Ghana as with Cuba. This view is partly supported by two administrators who saw the developments in the Soviet Union as the underlying reason for discontinuation, but who also ascertained that the decision to terminate the program was taken jointly by Ghana and Cuba because Ghanaian decision makers felt they could not any longer take advantage of Cuba's generosity in light of that country's economic problems in the early 1990s. According to this view, termination was not unilaterally imposed by Cuba on Ghana, but was the outcome of discussions and mutual agreement.

The literature on Soviet aid to Cuba suggests strongly that the political shifts in the Soviet Union had a major impact on Cuba's economic position. Since 1972, Cuba had been one of only three countries located in the Third World that received major benefits as a member of the Council for Mutual Economic Assistance (Comecon or CMEA). Comecon was formed after World War II as an interstate organization through which its member states aimed to achieve mutual goals in economic and scientific/technical cooperation (Curtis, 1992). Cuba was heavily dependent on intra-Comecon trade: Curtis suggested that it amounted to 83% of Cuba's total foreign trade in the early 1980s. In

1987, when the economic reforms conceived by Soviet president Gorbachev started to be implemented in the Soviet Union, Cuba's share of COMECON's overseas economic aid had risen to 75% (Curtis). Shearman concluded in a journal article that year that the Soviet Union's economic situation would decrease aid payments to poor developing countries. In that context, Cuba – along with Vietnam – was described as a “large economic burden to the Soviet Union” (Shearman, 1987, p. 1087). Politically, Gorbachev sought to distance himself from more radical states in the Global South to boost the Soviet Union's position in international relations, and to economically integrate his country with the rest of the world (Shearman). After the dissolution of COMECON, the Cuban economy went into a steep decline: In the four years from 1989 to 1993, Cuba's GDP fell by 35%, and the export of goods and services decreased by approximately 70% (Brundenius, 2002). The disintegration of the Soviet Union thus affected Cuba in two profound ways: the disappearance of COMECON as Cuba's primary trade mechanism, and the loss of direct aid support by the Soviet Union.

One administrator provided a varied perspective of three main reasons for the ending of the Isle of Youth program which synthesized the various explanations advanced by others. According to this study participant, the following factors contributed to the final decision:

1. A program review which was precipitated by the changing political, economic and social situation in Ghana itself, especially political shifts that resulted in less enthusiastic support for the program towards the end of the 1980s than it had received at its inception.

2. Changes in the Ghanaian education system, in particular the opening of more schools that at least in theory resembled the more utilitarian approach common in Cuba, and, as a result, the desire to focus on targeted postsecondary education in Cuba, rather than secondary level education for Ghanaian students.
3. Finally, changes in Cuba itself brought on by the global changes in the formerly socialist countries would have made it difficult to sustain the large assistance program for international students on the Isle of Youth over time.

The respondent noted that the review took all these factors into account and concluded that assistance from Cuba was subsequently sought for students entering university, with emphasis on agriculture, medicine, and sports.

The close collaboration between Ghana and Cuba did indeed continue in a broad range of fields, including education, trade and health. Very recently, in April 2008, the two countries signed a wide-ranging memorandum of understanding for a Permanent Joint Commission Cooperation that covers “education and sports, health, trade and investment, tourism, scientific and industrial research as well as initiative [*sic*] for the private sector” (Sackey, 2008, ¶ 2). Specifically, the memorandum allows for Cuban specialists – both academics and practitioners – to travel to Ghana and to provide expertise in areas such as health and biochemistry. The document also commits Cuba to offering 30 postsecondary scholarships to Ghanaian students for training of 20 medical students, with the remainder of scholarships to be awarded in the disciplines of engineering, sports, health technology, and mining (Sackey). The provision of 20 medical scholarships had already been announced two months earlier following a meeting between senior government officials of both countries (Government of Ghana, 2008).

The agreement is reciprocal in that Ghana has committed to assist Cuba in gaining access to cocoa purchases from the Cocoa Marketing Company, while Cuba in return will train Ghanaians in the manufacture of artisanal chocolate and agro-processing technologies (Sackey). This memorandum is the result of a long-standing bilateral co-operation through the Ghana-Cuba Permanent Joint Commission for Cooperation that has met every two years since the early 1980s.

The section on The Political Dimension in this chapter will throw some further light on the political climate in Ghana at the time when the Isle of Youth program ended. In the remainder of this chapter I discuss and analyze the program in relation to the major dimensions that emerged from the interviews, and which form the chapter's subsections. These subchapters can broadly be grouped into three categories: the experience in Cuba, (non) return and reintegration, and broader socio-political issues.

**Figure 1** ESBEC #22 in February 2008



### **Student Recruitment – Benefiting the Poor?**

As outlined elsewhere in this dissertation, the structural adjustment policies of the 1980s had a severe negative impact on the state's ability to provide education for free, especially at higher education levels. The new policies dictated that education costs were at least partly to be borne by users which put higher education out of reach for the lower social classes (Assié-Lumumba, 2000). In this context, one of the main features of the Isle of Youth program was an egalitarian aspiration to provide opportunities to students throughout Ghana, which was to be achieved through identifying scholarship students just as they entered the secondary level. The majority of students, even in remote areas of Ghana and regardless of economic background, were still in school at the end of the first (primary) level. A 1986 UNESCO document indicated that in 1980, enrolment in the first

level of education in Ghana was 73.1%, unevenly split between 81.7% male and 64.5% female students (Cisse, 1986). At the secondary level, enrolment had fallen dramatically to an overall 35.7%, with the same pronounced gender imbalance of 44.0% male and 27.4% female students still in the education system (Cisse). Early recruitment thus held the promise of an enhanced possibility that selection would be based on academic aptitude and would also reach those students with weaker socio-economic backgrounds. Selection of students in the upper school years or after completion of the equivalent of a high school diploma would have eliminated the large majority of students who had dropped out of school due to their families' socio-economic circumstances.

Access to advanced levels of education in Ghana was and still is partly related to students' geographic location. Even in 2002, students' residence was still the most decisive factor with respect to determining their chances of university access: During that year, almost 60% of students in Ghana's five public universities came from the two more affluent regions of Greater Accra and Ashanti, whereas residents of two of the most deprived areas, Upper East and Upper West Regions, constituted only 5.5% of all students (Manuh, Gariba, & Budu, 2007). At the same time, only the University for Development Studies in the northern city of Tamale had proposed a quota scheme to improve university access for rural secondary school graduates (Manuh, Gariba, & Budu).

The Isle of Youth program thus represented an innovative approach to a problem that is still plaguing Ghana today. The interviews revealed that it took a few years to devise and optimize a recruitment process that, at least in theory, offered a mechanism to provide opportunities for all academically worthy students in the country. Administrators

and several graduates reported that, in the early years, students selected were frequently related to people with links to the revolutionary government of president Rawlings. One of the administrators explained how this came about:

So when the offer was made in 1982, by then we didn't know how to initially start to implement the program. ... So then, the National Youth Organizing Committee ... was tasked with the recruitment exercise. So the idea was to allocate various places to various organizations ... progressive/revolutionary organizations like the June 4th Movement, New Democratic Movement, Federation of Ghanaian Women, 31st December Women's Movement ... Friendship organizations with the Socialist countries – Cuba, Soviet Union, Bulgaria, East Germany ... in addition, the Committees for the Defense of the Revolution .... (Nsoah)

In those early days, Cuba sent a delegation to help with the screening of documents for the preliminary list of students identified. According to the administrators' reports, the recruitment process became more streamlined with the third and fourth batch of students dispatched, less linked to those affiliated with mass organizations, more focussed on benefiting economically disadvantaged segments of the population, and directed towards all regions of Ghana, rather than just the urban centres.

Two administrators explained in detail how, from their recollection, the recruitment process worked: Once people in the rural communities became interested in the program, a competitive application process was devised and carried out in the Districts and Regions with the help of district-level and regional POSICAs. Student applicants typically had to write exams at the district and regional levels before being selected for the final cut at the national level in Accra. Each of Ghana's 10 Regions had a quota of 10

students, for a total of 100. Overall, 120 students were selected every year under the program, with 20 places reserved for “protocol cases” – children of those with political links. The district POSICAs had guidelines to ensure that academically deserving, needy students got special attention in the application process. Parents had the possibility to file a report if they felt that the POSICAs did not adhere to the selection guidelines.

Regardless of whether students were selected competitively or were protocol cases, they had to pass a standard aptitude test in Accra and a medical examination.

Of the 17 graduates who talked in detail about how they had been recruited for the program, nine underwent a competitive screening process with multiple exams, whereas eight alluded to various types of family and other connections based on which they had been selected. Three of the eight graduates that did not participate in a competitive examination process were recruited during the first three years when such a process was not yet in place everywhere. The remaining five reported family connections to military or political circles. One graduate also pointed out that there appeared to have been a push towards strengthening the recruitment effort in the more rural Regions in the north of Ghana.

Table 5 on page 181 shows the Region of residence for 40 out of the 48 graduates who participated in this study, as well as their intake year. The five students in the sample who resided in the two most deprived Regions of the country were recruited in 1986 or later. Northern and Western Regions - number 4 and 5 on the list - together have three participants who were recruited during the first program intake in 1983. The sample of 40 graduates for whom the Region of residence is known included only one person from Greater Accra, the most affluent Region, who was recruited during the first two intake

years. Of the seven graduates who were recruited in 1983, four come from Northern and Volta Regions, one from Eastern and one from Western Region, and the Region of residence for the last graduate is unknown. The sample is too small to allow for extensive correlations or draw any decisive conclusions as to the recruitment pattern, in particular since it is unknown as to whether those residing in the more deprived Regions actually came from weaker socio-economic backgrounds, or had military or political relations to the program organizers. It is interesting, though, that the sample shows a slightly more positive picture for early recruitment in the poorer (though not the poorest) Regions of the country than the administrators' accounts might have led one to suppose. Although this situation could simply be a peculiarity of the sample, it does indicate that the poorer Regions of the country did participate even in the first years of the program

The sample indicates that recruitment resulted in the majority of Regions being represented, albeit likely somewhat unevenly. Given the exploratory nature of the study, my sample was not large enough or broadly representative of the program participants to allow for definitive conclusions in that regard. Noticeable in this context is the absence of any graduates from Brong Ahafo Region (one of the poorest Regions in 1992) in this sample, and the single graduate from Ashanti Region, the second richest Region. Several administrators indicated that the recruitment process was established unevenly across the country. They stated that in some Regions, competitive selection was already underway in 1985, the second year that recruitment took place (no students were recruited and no students went to Cuba in 1984), whereas it took another year in other Regions for competitive selections to be implemented. The graduate from Eastern Region who went to Cuba in 1985 reported having participated in a selection process by exams at different

levels. A graduate from Northern Region who, by his own account, came from a deprived background did not participate in district-level and regional exams in 1986, but applied directly and was accepted after hearing about the program through a friend, though he did have to pass the usual exams once he arrived in Accra for the final selection. Another graduate from the same Region and also from a deprived background who was recruited in the same year reported having undergone various exams at different levels (Municipality, District, Region) for selection. Neither of these two graduates appear to have had any military or political connections. One administrator indicated that competitive selection was only systematically instituted after the first three batches of students left, which would have been in 1987. Apparently, differences in recruitment processes did not just occur between Regions, but also within the same Region, likely at the district or municipal level. This is not surprising, given that the program was highly competitive, and recruitment likely did not proceed in all cases exactly in accordance with the scheme that had been devised in Accra. Several administrators recalled that by 1987, competitive selection processes had been widely implemented across the country. There are still instances of graduates, though, who did not undergo competitive selection during 1987 to 1989, most likely either because of imperfections in the application of the recruitment scheme, or because they were part of the 20 protocol cases set aside every year for students whose families had links to the political leadership.

Several graduates commented that they would not have been able to continue their education beyond a certain grade. One graduate even reported having been expelled from school for non-payment of school fees at the time that he learned about the program. “They give the opportunity to anyone who can write the exam provided you, that you

were a student” (Botwe, graduate). Another graduate commented on how his educational experience compared with that of his friends back in Ghana:

When I was there [in Cuba] then I was communicating with my friends back here in Ghana and realized that some of them finished school the high – junior high school ... because of financial problems, they didn’t go forward ... and I realized that, there, I made a good choice because I was from a very poor background. So, if I would have been in that community, maybe I would have also been caught up in the same situation. (Nyamekye)

The program thus had the potential to address the problem outlined by Todaro (1989) of high drop-out rates in Majority World countries before students complete a particular cycle. Table 5 on page 181 shows that 13 of the 25 graduates who responded to this question declared that their parents would not have been able to afford them a similar education in Ghana, and two others indicated that only with certain restrictions and hardships would their parents have been able to afford them a comparable education.

Irrespective of the exact specifics of when and to what extent the implementation of selective testing processes was completed, it appears from the participants’ accounts and from the demographics provided in Table 5, that the program was reaching historically disadvantaged groups in society. The participants’ perspectives corroborate Richmond’s (1990a) claim that the program’s intent was to benefit students whose educational opportunities would have been limited at home. In this regard, it is also important to note, as one graduate pointed out, that access to postsecondary education was not just limited by attrition and socio-economic factors, but also by the very limited availability of places at postsecondary institutions. Although the group of graduates interviewed does not

constitute a representative sample, and complete data on all Ghanaian program graduates' socio-economic background are not available, it appears that the program contributed to attempts to overcome the colonial legacy of inaccessibility to educational programs outside of the metropolitan centres. Had the program been further optimized and continued for a longer period of time, it may potentially have had the desired effect with respect to more equal educational access and attainments across the Regions. Given the abrupt ending of the program, that effect was limited as far as student numbers are concerned; however, the program was in the process of developing and enhancing a mechanism for organizing a scholarship program based on the principle of equality of opportunity.

### **Work and Study Program – Trials, Tribulations, and Gratifications**

In her historical account of Cuba's "Island of Dreams", McManus (2000) noted that,

The island's gold lies in its citrus orchards – grapefruit, oranges, limes. It takes three years for a grapefruit seedling to grow and yield fruit, but the plant may go on producing for forty or more years – as was true of some 600 hectares of orchards the American settlers laid out in the early years of the century. Between 1960 and 1980, nearly 45,000 additional hectares were planted, and the 1987 harvest totalled 150,000 tons, of which 120,000 tons (mostly grapefruit) were exported to socialist countries (*Granma*, 5-4-88). Thousands of students took parting pruning and fertilizing the orchards and harvesting the fruit for local consumption, but professional workers selected the grapefruit designated for export. (p. 134)

Participation in the work and study program played a prominent role in many graduates' memories. Although many students found the work component difficult in the beginning, in retrospect the majority agreed that it contributed to their general education by providing them with the tools to cope with "anything in life". Thinking back to their time on the Isle of Youth, a few graduates reported having perceived the program's work component almost as a form of punishment. In hindsight, they mentioned that the work component had instilled a sense of discipline, duty and purpose in them, and that it discouraged them from becoming lazy professionals later in life who just like to sit in their offices. Some graduates remarked, though, that going to farm in the morning affected their ability to focus on academic work in the afternoon because they were tired and sometimes fell asleep during class.

Differences were noticeable between students originating from rural areas versus those from urban centres. In rural areas of Ghana, it was quite common for children to help their families with work in the farms after school and on weekends. The work and study program on the Isle of Youth was thus not any different from what they were used to at home. A graduate from a deprived rural socio-economic background described his experience as follows:

Isle of Youth was very interesting, because the program there, maybe during your research you will find out that it was work and study. It was basically going to... maybe, attending classes in the morning, and going to farm in the afternoon, or vice versa. Practically, that was really what I was doing in my village, so that wasn't new to me. It was.... so, I fitted into the program very well. (Adeben)

Some of the female graduates reported having done small-scale gardening work in the school gardens of the girls' schools they attended in Ghana. For students coming from larger urban areas, such work was less common or was unknown, although many of them were also used to helping with household chores at a young age. One graduate whose father had a military background alluded to the fact that farmwork was highly unusual for him:

The very idea to do farming, the work and study aspect of the whole program, I mean taking myself as an example, at the age of 14, if you were back home, mommy will cook for you, your clothes will be washed by mommy, ....(Anane)

One administrator explained that

In Ghana, work was not part of the educational system. It was very difficult to get the students to accept that part. There were lots of complaints and resistance, and some called it slavery. ... Those from the cities found it most difficult. The students from rural areas [are] more accepting of it. ... It is important for students to learn that school is also about contributing to society. Some students thought that they were working in order to pay for their education, but this would have only paid for a fraction of the costs of education. (Danso)

There were also discernible differences between graduates living in the Bahamas and those living in Ghana with regard to perceptions about the work and study program at the secondary school level. On average, those living in the Bahamas appeared somewhat more preoccupied with that part of their experience in Cuba and spoke comparatively more about it. In the memories of most graduates in Ghana, the work and study component on the Isle of Youth occupied a less prominent place in relation to their

overall educational experience in Cuba. This observation is likely to be at least partly attributable to the fact that the vast majority of graduates in Ghana are working in their field of study and are thus focusing on how the postsecondary experience prepared them for their current professional work, whereas several of the Bahamas-based graduates have not been able to secure employment directly related to their field of study.

Some graduates saw the work and study program as a healthy, fun activity at best, or a nuisance at worst; one person, however, felt that there was an element of exploitation.

When we used to be on the Isle of Youth, Cuba used to export grapefruit to Japan and ... the Soviet Union. ... After the program collapsed or after we left the Isle of Youth, everything collapsed. ... They didn't have a working force. They used us as a working force. (Gyasi, graduate)

Opinions differed widely in this regard. One student noted that “there was a lot of talk about [the work and study], ... [that] Castro was using us as slaves in these cane fields. But, to tell you, it was nothing, I wouldn't consider it anything like that. To me, it was a healthy lifestyle” (Donkor). Another graduate was of the opinion that “we paid for the program, for the tuition, because Cubans used us to work on their farms. They said they would give us education, free, but in those days, we did not know that it was ‘free’ in inverted commas” (Gyasi).

Apart from the regular work during the school year, students were also able to work additional hours in the summer to earn some money. The pay for this program was perceived to have been much too low for the work performed: “People, people won't go on record to say this, but I tell you, they felt exploited. You know, they felt that they

worked too hard, and got paid very little, during those summer programs” (Etse, graduate). “The program was such that our people paid, indirectly. The Cubans said ... it was a scholarship. ... when I think back and think about the whole program, I feel we paid every penny for the program” (Gyasi, graduate).

This perspective regarding the economics of the program was contested by one of the administrators, when asked about it.

I don't think there's any way that the amount of work they did was equal to the costs of educating about 1,200 of them. I don't think so. ... Considering the whole Cuban economy, what contribution ... what their contribution could mean ... you know, what percentage of it is it? (Nsoah, administrator)

The administrators pointed to the philosophical underpinnings of the work and study principle: the harmonization of theory and practice in preparing students for life; the responsibility for every citizen to learn about farm work because Ghana is essentially an agricultural society; and learning useful practical skills related to the repair of simple machinery and basic engineering skills. One administrator noted that this program was an alternative to the “ivory tower” situation of the academy prevailing in Ghana at the time. The link between the work component of the program and governance issues in Ghana was particularly well illustrated by one of the administrators:

And a percentage of the Ghanaian students feel that agriculture is only for the poor. There are children who are born in Accra, bred in Accra. They go to primary school in some international school like Achimota Primary. They continue to Achimota School, they come back to the University of Ghana, they graduate, they do National Service in Accra, they work in Accra, they die in Accra, and they are buried ... in

Accra. They have never seen the cocoa pod. So such a person, if you are making Minister of Agriculture, you can see that he will not be an efficient minister. When you are talking about a cocoa in the city, it doesn't mean anything to people. Because he doesn't even know how – what it takes to make a cocoa farm, let alone when the cocoa is grown, what it takes to bring it to your table. So he is not appreciative. He doesn't take decisions that have direct bearing on the people at the grassroots. (Musah)

Work at the postsecondary level, apart from the practical work terms associated directly with the respective study programs, was far more infrequent. Several graduates reported having participated at certain times of the year in voluntary work organized by the students' organization, the Federación Estudiantil Universitaria (FEU). In particular in times of crisis, such as natural disasters, but also during the annual harvest, universities might close down, and students were asked to help out with farm work. Many universities seem to have closed down for two weeks every year in order to enable the students to engage in volunteer work programs. The scheduled two-week work program appears to have been compulsory rather than voluntary, but apart from that, participation in further volunteer work was up to the students' discretion.

### **Determination of Postsecondary Programs**

The interview process revealed a gap between the administrators' and the graduates' understanding of Ghana's needs at the time the program was conceptualized, and consequently of the underlying rationale for negotiating particular postsecondary programs over others. Administrators saw the program mostly from a utilitarian perspective: It was devised as a means to fill critical skills shortages in Ghana which

existed largely in mid-level technical and professional fields. For this reason, Ghana negotiated for up to 60% of all postsecondary placements to be in polytechnical institutions, whereas 40% were university placements.

When the program was initiated, we didn't have sufficient numbers of middle-level technical people in the country. ... We wanted to essentially make a transformation of the economic situation, ... so we needed technical personnel of that category. So, although ... some of them were upgraded to university level, it was the minority rather than the majority who went to university. Because already in our country, we were producing university graduates, but then we didn't have polytechnical [graduates]. By then, we had just about three polytechnics in Ghana. (Nsoah, administrator)

This perspective is reflective of Sutton's (1967) formulations who argued that underdeveloped countries required people who could apply knowledge and skills in concrete circumstances, rather than people with high-order intellectual capacities. The emphasis on polytechnical training was also illustrative of a rationale that the UNESCO would later adopt, as outlined in the UNESCO's recommendations (1998) which assigned an important role to vocational and professional education in meeting the needs of lower-income countries. According to one administrator, the Cuban side initially set the number of places in different disciplines, but later on, the Ghanaian representatives were able to have their needs built into the program.

The graduates did not have a good understanding of why Ghana negotiated for the types of polytechnical placements that were on offer, especially in light of the fact that Ghana did not appear to have a ready job market for those careers (this issue is discussed

in further detail in the section on Reintegration: Employment, in this chapter). From the students' perspective, picking some of the best and brightest students in the country with high academic aspirations, yet streaming many of them into polytechnical rather than university programs, constituted an inherent conflict built into the program. Many students had hoped to pursue academic careers, and so therefore felt that there should have been a higher allocation for medical and other "prestigious" study programs. Not surprisingly, students hoped for maximum opportunities to reach their highest possible academic potential, which only partly coincided with the program's objectives as determined by its organizers.

Opinions amongst graduates ranged widely as to the level of input that Ghana exercised regarding the selection of academic programs. Some students believed that the Cubans would have made available whatever programs the Ghanaians needed, and that all the limitations came from the Ghanaian side.

The Cubans opened the doors and said, 'You choose anything you want from a master thesis or whatever.' And then your government says, 'I want agronomist and I want veterinary people and I want only ten medical students and I want ten engineers. ... and you come back home and didn't even understand what the name of your – I mean the concept of your career means. (Mawuli, graduate)

At the other end, some students questioned as to whether Ghana really had any input into the study programs made available to them:

Some embassies in Cuba had told the Cuban government that they wanted places in A, B, C field. ... But I doubt whether Ghana did the same thing. ... So I think the requests, or maybe the organizers ... they didn't follow what – they didn't know

what they needed. They did not, sort of, use the Embassy in Cuba to get the Cuban government informed that we needed this or that. That is why the field of education for us was very narrow. (Oko, graduate)

In this case, the graduate's doubts about Ghana's program negotiations were based on the assumption that Ghanaian decision makers would have requested more places at the university level in advanced degree programs if they had been given a choice. The underlying rationale appears to be that Ghanaian officials would have operated on the basis of the same ranking list of academic disciplines that the students used, thus ignoring that Ghana as a country might have had different priorities.

Another graduate used a different line of reasoning for making the argument that postsecondary programs open to the Ghanaian students were not subject to requests by Ghana:

The engineering courses, they were good, but of that time, they were no good for the country. They said it was the country that actually chose those courses. I don't believe it. I think the country has no capacity to absorb that number of engineers that were in Cuba. ... They said that the government requested for those courses, but I say that this was not true. We did not have the capacity - even of now, we do not have the capacity to absorb some of those people. (Fenuku, graduate)

In this case, the underlying assumption is that the Ghanaian authorities would not have asked for academic placements in areas in which they did not have any absorptive capacity. As I explain in more detail in the section on reintegration later in this chapter, this appears to be a wrong assumption, although the logic behind this line of thought makes sense from the perspective of the graduates.

As briefly outlined in the section on the Genesis of the Isle of Youth program, the main mechanism used to stream students into the various postsecondary programs was the order of merit. A student's position on the order of merit was determined by a number of factors: academic performance, participation in the work assignments under the work and study program, volunteer work, social conduct, and general personal comportment. The normal course of action was that the order of merit was first consulted after grade 9 to determine which students were to continue on to the pre-university level (grades 10-12), and which students were to go to polytechnical institutions for vocational training after grade 9. There was a cut-off of about 40 students annually who could enter pre-university, so the 41st student, even though he or she may have been academically prepared to enter the university stream, had to go to a polytechnical institution due to the quota system. A few students went to polytechnics later once they had entered university and found it difficult to keep up; however, this was the exception rather than the rule.

The second time the order of merit was consulted was after grade 12 to determine the university programs available to individual students. The students put down their top three choices, and the higher a student's standing on the order of merit, the more likely it was that they would get their top choice. These choices were to a considerable extent influenced by students' perceptions of the prestige or desirability of certain study programs, with human medicine topping all others. It appears that these perceptions about the high profile of human medicine were to some extent already formed in Ghana before the students' departure, and peer pressure and the scarcity of places available in this study program did the rest. "When you are among the people who would fall in the medicine group, there's that student pressure on you to automatically choose medicine. No one is

telling you to choose it” (Anane, graduate). Several graduates commented on their desire to study human medicine, having to settle for other programs because they didn’t quite make the cut for their first choice. This led to a certain degree of frustration: “We didn’t have a choice to pursue the career you wanted. You had to choose between the lesser of the evils you were offered” (Etse, graduate). Although this graduate did not elaborate on what he meant by “the lesser of the evils”, I gathered from the context of the discussion that he, as several others whom I interviewed, referred to the limitations that existed not only in relation to students’ academic performance (a situation common with regard to access to most universities throughout the world), but also in relation to the specific programs negotiated between Ghana and Cuba. “Evils” in this context then means programs that the students would not have selected if they had had free choice.

There are some courses that were just useless for us. ... Medicine was very, very important, and I think that 60% to 70% of us who went to Cuba should have read medicine. And veterinary science, animal husbandry – these are things that we need to really get this country developed. (Adeben, graduate)

Carnoy and Werthein (1983) had pointed out the contradiction embedded in this streaming method into the postsecondary system in Cuba: The selection that centred around an order of merit reflected an elitism where certain professions such as human medicine and dentistry enjoy a privileged status over other professions. On the other hand, the curriculum and ideology behind the educational revolution intended to integrate education and production at all levels of education around the notions of moral incentives, the new socialist man ideology, and the removal of barriers between manual labour and intellectual activity. Apparently, the hierarchy of professions was thus not just

something that the Ghanaians had carried to Cuba from their home country, but it also existed in Cuban society. It has to be noted, however, that Carnoy and Werthein's assessment of human medicine and dentistry as "privileged professions" in Cuba may have been a misjudgement, based on common notions associated with these professions in capitalist societies. Given the importance that Cuba is placing on humanitarian values, it is conceivable that human medicine enjoys "privilege" as the highest expression of such values, rather than for the class status or money associated with this profession in capitalist countries.

Some graduates explicitly took issue with the notion of integration between academic and productive work in the streaming of students into postsecondary programs. One of the graduates referred to this system as "the farming factor: let's say I was very good academically. But if I wasn't going to farm, I had a lesser point, for the farming, at points. You gain points, going to farm, or working in the fields" (Gyasi). In this case, the reference is to additional volunteer farming work over and above the regular commitments under the work and study program. Students generally criticized the mechanical nature of the streaming process, and some of them bemoaned the fact that little career counselling was available to help them in their career choice. Apart from the dictates of the order of merit, students also took into account factors like their friends' top three choices, and geographic location of certain academic programs on the Cuban mainland.

The order of merit system introduced a considerable level of competitiveness into the program. Competition for streaming into pre-university over polytechnical programs, and later competition for streaming into limited places for highly regarded study

programs, does not appear to have severely affected the spirit of camaraderie and solidarity between the graduates, though. Rather than feeling unfairly treated with respect to their Ghanaian peers, a number of graduates expressed that they would have preferred a combined order of merit list for all international students represented on the Isle of Youth.

They should have merged all the lists for the different countries together, and then the ones on the top would have been able to choose from all available courses. But that's not how they did it. Every country had its own list. So you could be further down on your country's list, but in comparison with other countries, you would have been top. So somebody from another country might get a place in medicine, even though they would have been further down from you on a merged list.

(Akvesi, graduate)

One administrator confirmed that this request is understandable since Ghanaian students' academic performance was indeed higher than that of many other nations. Apparently, though, it was unrealistic to expect that such fundamental changes would have been made to the overall Cuban programming with multiple nations based on the concerns of the Ghanaian students. All of the agreements between Cuba and the countries represented on the Isle of Youth were bilaterally negotiated, and given the breadth of structural differences between those countries, individual programming arrangements seemed like the only feasible option.

One disadvantage associated with starting this program at the secondary level was the lack of a clearly developed sense of career interests and aspirations among students of such young age. Also, students were too young to do the kind of planning that a person

coming out of high school would do to decide on a postsecondary study program. Consequently, the students were not clear on the types of programs that would be available in Cuba and the limitations that existed in terms of choosing programs. For those whose aspirations, as they grew into adulthood, were not congruent with programs offered, the situation was problematic. The program obviously also did not have the capacity to cater to the students' innate talents. However, I encountered only one concrete example of such a mismatch when one graduate reported being very artistically inclined, which was clearly outside the program's focus. The low incidence of such reported mismatches may be explained by the fact that career aspirations only depend to a certain extent on a person's innate talents, and are otherwise influenced by the education, socialization and stimuli received as the person matures. For example, a few students noted that the availability of computers on the Isle of Youth prompted their interest in this field, and they went on to study computer science or automation engineering. Nevertheless, the most important determinant of students' career aspirations seems to have been the perceived ranking of disciplines on a scale of prestige, as discussed above.

Another point of contention was related to moving into postgraduate programs after students had graduated with a first degree. Several students received an offer from Cuban institutions to study at the master's level. In most cases, they ultimately did not pursue such studies for a variety of reasons, frequently related to a lack of forthcoming approvals from Ghana. There was some allusion to the fact that, in order to receive approval from Ghana for further study in Cuba, one "needed to know somebody". The regular procedure was that students had to return to Ghana and re-enter Cuba for postgraduate studies. They then still had to await formal approval from Ghana to take up the Cuban scholarship to

commence their study program. One graduate with a graduate studies offer did not pursue it because he “didn’t know anybody”. Another graduate reported having returned to Ghana, gone back to Cuba, but ultimately lost his place in the master’s program when Ghana had not sent the necessary approval after six months. A third graduate who was given a master’s scholarship went back and completed this degree in Cuba. A fourth graduate received a master’s degree based on a pilot program that Cuba instituted at some point, but abandoned again the following year. He thus received his master’s degree as part of the regular Ghana-Cuba bilateral arrangement. The experiences of these graduates are too diverse to draw any meaningful conclusions as to whether there was a pattern. However, it can be concluded that training at the master’s level was not part of the regular Cuba-Ghana agreement, and that the graduates interviewed for this study perceived some reluctance on the part of Ghanaian authorities to grant approval for postgraduate studies. This is not surprising in light of the fact that the program was specifically designed to provide Ghana with graduates holding mid-level professional designations and first-level university degrees, rather than advanced graduate degrees.

### **Relevance of Curricula and of Cuban Education for Ghana**

The call for integration of practical and theoretical work in higher education programs for students to get a better understanding of community issues and of working practices has been made, among others, by the UNESCO (1998) and by Woolcock (2002). In the African context, this idea of balancing the utilitarian and liberating functions of education was pioneered as early as the 1960s by former Tanzanian president Nyerere (Nkulu, 2005). At both the secondary and the postsecondary levels, Cuban education was more practica-oriented than Ghanaian education: At the secondary

level, this orientation was exemplified by the work and study program, and at the postsecondary level, all programs had practical aspects starting in the third year of study. Apart from these compulsory components, students also had the opportunity at the postsecondary level to engage in some limited voluntary work assignments. All of these settings contributed to the graduates' preparation to apply their theoretical knowledge on the job. Based on the graduates' accounts regarding the challenges they faced in Cuba with respect to certain materials and equipment due to the ongoing blockade, it can be concluded that they received preparation to work in low-tech improvisation contexts, in particular in rural community and village environments.

Carnoy and Samoff (1990) distinguished between what was going on inside and outside Cuban classrooms by stating that "the significant ideological emphasis on manual work and collective consciousness appears primarily outside the classroom, in the work activities of students while in school. The classrooms and learning processes in Cuban schools are otherwise no different from those in European education" (p. 192).

This view was corroborated by a graduate who noted that

Now, on the educational background, I think, there might be one or two differences, but on the whole, I don't think there is any big difference. See, if you study medicine in Cuba, or you study it in the U.K., I think, if your IQ is the same if you study wherever, I think, they will be good doctors ... will be good doctors. ... As I was saying, the place itself, has an effect on the people. Your, your... I mean, like it or not, someone who studies in Cuba has a perspective of life, of a situation, different from someone who might have studied in the - in Ghana or the U.K. The

practical aspect of it is very important, whether we like it or not – it's very, very influential. (Anane)

This graduate extended the notion of learning outside the classroom not just to the manual work dimension, but included the totality of the Cuban life experience in this learning situation.

This focus on applied education has been a major concern for African countries since the early 1980s. The July 1982 Harare Conference of Ministers of Education and Ministers Responsible for Economic Planning in African Member States of UNESCO stressed the link between education and work, and explicitly called for more technical and vocational education in support of priority production sectors (Cisse, 1986). Cisse concluded that

The social aims of education call for a closer link between schooling and the world of work, so as to inculcate in pupils at all levels the idea of team work and a respect for manual work (which needs upgrading in relation to intellectual work). In this connection the Harare Conference emphatically restated the importance of productive work in education. (p. 8)

The design of the Cuba-Ghana program seems well aligned with the recommendations of the Harare Conference. The focus on preparation for work through out-of-classroom programs, however, needs to be broadened to make the link to work an integral part of the in-class curriculum. In this context, several authors (Myers, 1972; Weiler, 1984; Wolhuter, Steyn, & Steyn, 2003) noted the importance of contextually relevant learning which allows students to apply methodologies and work with machinery and equipment that is available in their home country context. In this regard, experiences in the present

study differed based on the timeframe during which graduates had been in Cuba, as well as by discipline. All interviewed graduates in Ghana reported that their training was adequate for the Ghanaian context. It was remarked that equipment used in various professions in Ghana was different from the Cuban equipment; however, because Ghanaian standards were generally perceived to be lower than those in Cuba, graduates felt that it was easy to adjust. Also, it was mentioned that in Cuba, everything was “do-it-yourself”, done with few resources, whereas in Ghana there tend to be more resources. The veterinary medicine graduates stressed that the focus in Cuba is on livestock, suitable to an agricultural society, rather than on small companion animals like cats and dogs. However, most students of veterinary medicine had the opportunity to take a course dealing with companion animals. They also felt that the solid basis of their veterinary training enabled them to adjust easily in other environments. According to one graduate, the diagnostics were done manually, without any advanced technology. This basic “learning from scratch” enabled them to adjust in various veterinary contexts after graduation.

Similar comments were made by a graduate of chemical engineering and pharmaceutical science who pointed out that the problem-solving skills the Cuban-trained graduates had acquired allowed them to adjust both up and down the “sophistication scale”:

In Cuba, the state is aware of all the developments. They might not have all of the sophisticated machinery, so they try alternatives to solve the same problem. One plus one, somebody in Canada or the United States would just take a calculator, and that’s it. Back in Ghana, there’s no calculator ... we find ways, maybe some

unorthodox ways to what the situation is. ... So, if you are like in a developing country, that's where you were trained, and if you go to the developed world, you've been trained to deal with those things, too. (Anane)

Graduates of veterinary medicine also mentioned that in developed countries, students often do not get the opportunity to work as extensively on live animals as was the case in Cuba. This impression appears to have been formed through their interactions with peers during their studies in Cuba.

Some students come [to Cuba] ... like 10 years or whatever is that academic thing they bring from Spain or from Colombia; students come from even Ireland, and some time when you see these students, they haven't even seen a cow before. They haven't even touched a cow. And they are studying in their fourth year. And the first time they see a cow is when they came to Cuba. ... If you put the animal right before them, they don't know, they don't even know how to go about it. That's the big defining thing. (Kweku, graduate)

A graduate of human medicine observed that medicine in Ghana is rudimentary, so the Cuban training, which – according to this graduate - was more geared towards the North American context, was more than adequate for Ghana. This graduate reported having more challenges adjusting up in the North American context after moving there. A graduate in automation engineering remarked that education in Cuba was far superior to that in Ghana from a technical perspective. He explained how Ghana is now thinking of applying some of the innovations that he studied in Cuba years ago, in particular with regard to small-scale industries and energy-efficient solutions suitable to a development context.

However, not all graduates agreed completely on the value of the practical training they had received. In particular, some of those residing in the Bahamas and who graduated later in the program reported a lack of access to real-world applications in technical fields such as automation engineering, chemical engineering, and pharmaceutical sciences. This was largely attributed to problems associated with gaining access to instruments and machinery as a result of the disintegration of the Soviet Union and subsequent economic crisis in Cuba. Prior to 1990,

At that time, when I was in Cuba, we had everything. Cuba was still then, sort of, under the Soviet Union. ... So they had everything that they needed from the Soviet Union, in terms of science apparatuses, chemicals, you name it. Whatever we needed for tertiary education in university, we had it. (Donkor, graduate)

After 1990, the situation was reported to have changed:

The one weakness was the availability of practical lab equipment. The quality in that regard was lacking. Some of the equipment was outdated, and in some cases, it was the amount – there was not enough equipment. We sometimes had to share one microscope amongst many students. But it was all there, and everything that was taught in class was practiced in the lab. (Tieku, graduate)

When I finish, I am going back to - let's say, I am going back to the country, like Ghana, my own country. Then, I am confronted with an apparatus made in the States. And it doesn't matter, I know my field, but there is no exposure to that particular... and that's the apparatus they use in the whole world. ... it still was very good, we were made scientists out of, I mean, you had to do something out of nothing. (Gyasi, graduate)

Having had to deal with outdated equipment or shortage of materials appeared to be less of a concern for those graduates now living in Ghana where the graduates generally see the sophistication of technical equipment to be lower than in Cuba. However, as the above quote shows, the opposite can be the case where individual graduates work in Ghanaian organizations or companies that have had an opportunity to acquire state-of-the-art technical equipment. It must also be noted that the majority of the graduates residing in the Bahamas who reported potential problems with scaling-up never returned to Ghana to work in their respective fields, so they have little grounds on which to judge as to whether the constraints they experienced in Cuba would have constituted an impediment upon taking up work in Ghana. Statements by graduates in Ghana suggest that they had to mostly adjust down, not up, upon return. For example, a graduate with a diploma in radiography indicated that the radiographic examinations equipment used in Ghana is of a lower standard than that used in Cuba.

The experiences of graduates regarding access to curricular materials vary. In general, it appears that the disintegration of the Soviet Union over time imposed limitations on the availability of current lab equipment. Some challenges were reported with respect to quality of books, some of which were outdated or in poor physical condition. Although graduates identified those issues as impediments in the educational process, they also saw a positive side to it: students learned to be resourceful, to use their imagination and to solve problems in unorthodox ways and without sophisticated equipment. One graduate commented that the critical thinking abilities the Ghanaians acquired in the Cuban system could hardly be found in other study environments.

The extent to which shortage of lab and curricular materials was an issue varied also according to the Cuban institution. In some cases, Cuban universities collaborated with institutions in other parts of the world, and one graduate noted that his university had two computer labs, one supplied by the UNDP, and another one in partnership with a Canadian university. Limitations on Internet access were reported by several graduates as having been the result of political restrictions imposed. Material shortages became an issue for those at the polytechnical level, in particular in construction. Building material was in short supply during the economic crisis of the 1990s, and one graduate reported that a carpentry program adopted a condensed curriculum, reducing the original 4-year program to a 2-year program.

All graduates indicated that they received very little instruction from the Cuban side in social science topics. At the secondary level, students took some basic courses in political knowledge: Marxism/Leninism and scientific communism, but most of the social science curriculum was devised and taught by the Ghanaian teachers. Once students got to the postsecondary level, the bilateral agreement between Ghana and Cuba prevented them from taking any subjects related to politics. This limitation appears to have been primarily related to the program's objective regarding formation of scientific/technical human resources. At the same time, it assuaged the concerns of those who feared that the program was used to train political cadres.

Gonzales (2000) corroborated the non-political nature of Cuban educational collaboration with African countries by stating that Cuban policies in this regard did not aim at conferring a certain political or economic model upon recipient countries. It was for this reason that the typical Cuban social science subjects taught to African students on

the Isle of Youth were replaced by indigenous and country-specific African subjects taught by those countries' own teachers (Gonzales, 2000). However, this policy also created some difficulties for graduates in the long-term after their return to Ghana:

Bottom line, we have to deal purely with the technical aspects of the career. And so you have to come down here [to Ghana] to learn and understand the business models in which you live. So this is part of it that is not well entrenched in us from there. I mean, we didn't learn much about business models and the economic aspect of life and work so those things because they are different societies. (Mawuli, graduate)

One of the four important functions that the World Bank (2002) attributed to the role of tertiary education in development is training for accountable and competent public sector management. None of the graduates I interviewed received any training in this area during their time in Cuba. The World Bank (2002) went on to argue that enlightened leaders (graduates who can confront society's economic and political realities) constituted a major dimension of the higher education-development nexus. Most graduates, when asked about their perception of themselves as potential leaders, argued that they lacked the respective training.

The Cuban system trained us to be leaders in our [professional field]. But not to be leaders in the political sense because ... almost all the courses [that] were involved with general politics we did not do. ... And if you don't see us moving to become leaders, big, big leaders, because we don't have that orientation. ... When it comes to technical things, we are very good, but we don't have that. That understanding of what really goes into governance. (Botwe, graduate)

Preparing political leaders to lead Ghana upon their return home was not an explicit goal of the program, as reported by the study participants. The lack of a focus on governance was thus consistent with the program's main objective of preparing graduates with superior technical skills. A number of graduates, however, were frustrated with this perceived waste of human resources. They felt that they had the intellectual capacity to effect broad changes in their home society; yet, they realized that they lacked the tools to approach this task.

Samoff and Carrol (2003) pointed to the false designation of recent educational ventures between institutions in Africa and higher-income countries as "partnerships" where the curricular and pedagogical models employed originate in the Minority World with little regard for African needs. The co-teaching of the curriculum on the Isle of Youth constitutes an attempt to ensure that students studying in an offshore setting can stay connected with their roots and their home environment. History, geography, English, and cultural studies were taught by Ghanaian teachers to the students at ESBEC #22. The curricula were not just taught alongside the Cuban courses; rather, Ghanaian course syllabi were adapted to the Cuban context to provide consistency with Ghanaian curricula, yet distinctiveness in the offshore context, in teaching social science topics to the Ghanaian students. In addition, students also continued with Ghanaian customs like prayer and siesta which were not practiced by Cubans. Once the students moved on to the postsecondary level, this close integration with their home country was obviously lost because they then moved into the general Cuban education system. At the tertiary level, the curriculum had no more components related to Ghana, and there were no further attempts to keep students connected to their home country through courses on Ghana.

Figure 2 shows the room in ESBEC #22 where the textbooks used by the Ghanaian teachers were stored. In February 2008 during my visit to the Isle of Youth, I recovered a number of books on English literature, West African poetry, African and world history, and Ghanaian geography from that room.

**Figure 2 Storage room with textbooks, February 2008**



The graduates I interviewed agreed that the overall quality of education in Cuba, both at the secondary and postsecondary levels, was excellent and very student-oriented. They explicitly commented on the high quality of teachers at all levels, given that all Cuban secondary teachers reportedly had teacher training at the time. Many university professors had written books and drew on their own research during lectures. One graduate described the assessment process as structured, extensive, and rigorous, with

written, oral, and practical elements. A graduate in chemical engineering compared the Cuban curriculum with that at the University of Science and Technology in Kumasi, Ghana, and concluded that the Cuban academic training was more rigorous than what his fellow Ghanaians went through in Kumasi.

Although perceptions regarding the relevance of their education differed to some extent, most graduates stated that the training they had received in Cuba prepared them for work in many different contexts, in Ghana or elsewhere. Many graduates indicated having the skills to synthesize information and adapt to any contextual situation regardless of whether they were familiar with a certain detail of their work. They attributed this ability to both their early years of education on the Isle of Youth, as well as the training they received at the postsecondary level. One of the administrators substantiated that claim by explaining that education in Ghana gave students a broader theoretical knowledge base, but that those students would not acquire the same level of applied skills as the Cuban-educated graduates.

Citing the World Bank (2002) again, another of the core functions of tertiary education for development was reported as providing a foundation for a country's social capital through instilling in students the norms, values, attitudes and ethics necessary for building cohesive societies. The graduates' reported perspectives and assessments indicate that their education in Cuba provided them with this kind of mindset; however, it fell short of giving graduates the practical tools to take on societal leadership roles outside of their immediate professional context. The graduates' strong focus on excellence in their respective technical fields has so far prevented most of them from seeking access to the political arena or to other venues that would start enabling them to

exert some influence over broader societal processes. As stated above, building a cadre of political leaders was presumably not the intent behind the program. However, the claim of the World Bank about the broad societal impact of tertiary education ought to be qualified in that value-based educational outcomes do not necessarily and automatically translate into practical leadership skills.

It should be noted, though, that several graduates described making broader societal contributions through their professional practice and leadership: Specialized medical doctors in Ghana noted that they are building up the human resource base in Ghana by training others. An ambulance service was instituted in Ghana under the leadership of an Isle of Youth graduate. An automation engineering graduate is working on projects to improve the lives of people in rural communities through computer applications and other technologies. These individual contributions are already starting to have a broader reach. Many graduates are still relatively young, in their early to mid-thirties, and it can be expected that the contributions they will be able to make to society will grow over time. As one graduate put it,

I have contemplated going into politics. There are currently two MPs in Ghana that were trained in Cuba. However, they cannot effect any change if the old heads are still active. Once we get younger people into government and involved in decision-making, then change will come. In 10 years, Ghana will be a different Ghana.

(Tieku)

### **Family Environments and Notions of Childhood**

The notion of children living apart from parents for extended periods of time seems highly unusual or even cruel to many people in Western (European and North American)

countries due to the European-derived perceptions of childhood commonly held in those countries. Other cultures, however, do not share these notions of childhood to the same degree. In Ghana, it is relatively common for children to live away from their parents with an extended family member such as an aunt or uncle. They might only see their parents very infrequently. The segmentation of parental roles amongst the wider kin group and resulting mobility of children in West Africa has been described by Anarfi, Kwankye, Ababio, and Tiemoko (2003). These authors concluded that fostering is part of the migration context and cited a demographic and health survey conducted in Ghana in 1998 which showed that “15.3% of children under 15 years of age were not living with either of their biological parents..... over one in five children aged 10-14 years were fostered out in 1998” (p. 24).

Although a physical separation between children and their parents or next of kin is more common in principle in the African context than in a North American or European context, living without any relatives for many years is clearly also outside the normal boundaries from an African perspective. Several graduates were living in Ghanaian boarding schools at the time they left for Cuba; however, they would reunite with their families during vacation breaks. Two graduates explicitly indicated staying with an aunt at the time they were recruited into the program. In other cases, graduates stayed with one or the other parent because their parents were not living together. I did not ask all of the graduates the question regarding living circumstances when they started the program, especially not those in the larger group interviews. However, the majority of graduates reported having very willingly, and often out of their own initiative, signed up for the program. In a few cases, the graduates did so initially against the will of their parent(s) or

caregiver, although the latter had to ultimately sign a consent form in order to enable the student to participate.

Despite this situation where living away from home was a more common occurrence than in most Western societies, being in Cuba for more than 10 years without the opportunity for a home visit created hardships for students and the need to develop coping mechanisms. Contrary to the more typical situation in Ghana where children or young adults lived away from home, but were still with a caregiver belonging to the extended family or with foster parents, the students lived with teachers, not family members, in Cuba. It is surprising that the continued separation from their families did not have a more noticeable influence on program drop-out rates which remained low throughout the program. Although it was difficult to obtain exact statistics on the number of students who returned early from the Isle of Youth program, one administrator estimated that over the course of the years, out of the total of approximately 1,200 students who arrived in Cuba, only around 30 did not complete the program. From the study participants' accounts, it appears that these students were in most instances repatriated because of conduct-related matters, and only a very small number returned on their own or on their parents' request. All students talked about their disappointment with regard to not having been able to return home to Ghana for visits during the program. Graduates now living in Ghana appear to be less impacted by their memories of the long absence from home, compared to their counterparts residing in the Bahamas. The latter seemed more resentful about this program aspect, especially because they felt "cheated" by the program organizers for "promising" them trips back home to Ghana every two years. The difference between the Bahamas-based and Ghana-based groups is not

surprising, given that the majority of graduates I interviewed in the Bahamas have never returned home to Ghana for an extended period of time.

As explained earlier, only a tiny minority actually got the chance to travel back to Ghana while participating in the program, a privilege reserved for the top performers. Asked about this issue in detail, perceptions amongst graduates varied as to whether a return promise was actually explicitly stated by the organizers, or whether this was a general view held by the young participants who could not have possibly imagined being away from their families for such a long time. Administrators indicated that promises regarding home visits were not made to the students because this was never perceived to be financially viable, and that economic conditions only allowed for this privilege to be granted to a few students every year on the basis of merit. It is likely that the perception of a promise for return visits manifested in the children's and young adolescents' imaginations, rather than in any verbal utterances by the program organizers. The following quotes demonstrate the breadth of views on this issue:

I always said to my parents, I would come back home, but then it never happened. I didn't get a chance to go home at all. It was first promised that we would be able to go home every two years, then it was every five years, and then, never. Some of us got to the point where we forgot about our parents. (Akwesi, graduate)

We were told we would be coming back every three years for holidays and I had to stay there for 18 years without visiting home. I never came to meet my mother ... It was at the orientation here in Ghana. It was part of the role that the Ghana government was supposed to play. That was what I was told. Every year, every

three years, they would bring us to Ghana, back to our country. (Nyamekye, graduate)

Yes. I thought I would come. ... I don't know if somebody ever said that. I don't know. Just like going to a boarding school, you come home on holidays, ... and show them all the new things you've learned. (Serwa, graduate)

It's a desire. Nobody promised them that they would come home on an annual basis or every two years or three years – they weren't promised that. There was only that promise that the best ten students, together with the best teacher, would come home as some incentive. That was it. (Nsoah, administrator)

The graduates' perceptions about a promise for return visits may also be based on their erroneous understanding regarding what was actually said at the pre-departure orientation session in Achimota or later Afienya, namely, that the very best students would get the chance to go back to Ghana for a visit. Even the teachers, who did not attend every orientation session, had some confusion in that regard, so it is more than likely that the children did not understand everything correctly. It should also be noted that the graduates' overall recollection of the orientation session was sketchy.

Not all parents were initially in favour of their children's participation in the program. One administrator and one graduate attributed this to some parents' (and in the case of the graduate, his parents') low levels of education, arguing that parents with little or no formal education had a challenging time seeing any benefits in a program that would remove their children from them and make them unavailable to help with

household chores. Not having an education themselves, they might have found it difficult to appreciate the benefits of an educational process that would only be realized at some distant point in the future. “Immediate needs come before some distant goal like education in those families” (Akweteh, administrator). In most cases discussed during the interviews where parents were initially reluctant to grant consent for their child’s participation in the program, this reluctance was based on the parents’ unwillingness to let their son or daughter go away for such an extended period of time for a purpose that they did not understand or appreciate.

On the other hand, a few graduates whose parents had little formal education reported that their parents were very much in favour of their children’s participation in the Isle of Youth program. They attributed this to a desire by their parents to provide the children with more opportunities than they had had themselves.

Some parents were also sceptical about the exact nature of the program, especially during the initial stages. One administrator explained that, “There were lots of rumours about the program. People were afraid that the children were taken as slaves to work in the plantations, or to be trained as soldiers” (Danso). Apparently, the political opposition ran an aggressive campaign against the program that took root with some parents. None of the students reported having experienced problems with getting their parents’ consent due to such adverse perceptions of the program. However, mention was made by a few graduates that such negative opinions regarding the program existed. It is not surprising that none of the interviewees directly encountered any challenges in this regard since they would likely otherwise not have received their parents’ permission to participate in the program and would not be part of the sample.

The physical separation of students from their families or caregivers for the purpose of the Isle of Youth program thus deviated from the more typical separation that occurred in Ghanaian society in at least three major ways: (1) Children were separated from their relatives for a much longer period of time; (2) Children lived outside Ghana at a distant geographic location and in a different cultural context; and (3) The reason for the separation – gaining an advanced education - was in some cases seen as too lofty and intangible to gain parents' and caregivers' unwavering approval.

The difficulties with recruitment during the first three years, as described earlier, appear to some degree to have been related to these negative perceptions of the program and the political opposition's propaganda. It is conceivable that some parents' perceptions about the program were reinforced by the fact that Ghana also signed agreements with Cuba in areas other than education, most notably cultural exchanges in fields of health and agriculture, but also training of Ghana's national militia, and provision of military advisers and security officers for the PNDC leaders (Ghana country studies. Other countries, n.d.). It is understandable that some parents would have confused one type of collaboration with another and may have suspected that the educational training program would also have military or political/ideological components attached to it.

### **Gender Issues**

During the six years of student intake, the program accepted far fewer female than male students. Although detailed statistics for all graduates are not available, the triangulation of qualitative data generated in this study indicates that the program was heavily gender-skewed. One of the administrators advanced the theory that 40 – 50% of

all graduates were female; however, these figures are not at all borne out by this research. The administrators consistently claimed that the first intake in 1983 included about 100 female and 500 male students. Students of different sex were segregated by dormitories, and it was explained to me that the way in which the dormitories were arranged resulted in one group having a much larger contingent of dormitories than the other group. Of course, it could have also been decided to send 500 female and 100 male students, but the quota was set the other way around. After the first intake, the original arrangement was apparently that whatever numbers of female students were moving into higher levels would be replaced with girls again, which would have resulted in approximately a steady state of female students on the program.

However, this is not what actually seems to have happened. Several participants indicated that as of 1987, no more girls were recruited to participate in the Isle of Youth program. Scholarships were still provided by Cuba for female Ghanaian students to go directly to university through a variety of channels, but the female students no longer went to ESBEC #22 for secondary schooling first. On August 3, 2008, I checked the members list on the ESBEC.com website which, at that point, contained names and some biographical information for about 25% of all Ghanaian students who had participated in the Isle of Youth program (based on the overall figure of approximately 1,200 graduates at which I arrived through data triangulation as explained in the first section of this chapter). The list does not contain any female names that state 1987, 1988, or 1989 as year of intake. As to whether this was a deliberate policy, and if so, what motivations were at the core of the policy, has been the subject of much debate. A graduate who went to Cuba in 1986 claimed that there was a 4:1 or 5:1 ratio of male students to female

students in her batch. This was corroborated by another graduate who provided figures of 24 girls and 100 boys for the same year, and who claimed that “some of the girls got pregnant, so the government of Ghana decided to not give scholarships to girls after that. ... As of 1987, only boys from Ghana came to Cuba. Later on, some females came and did just a university degree” (Tieku). Two other graduates who went to the Isle of Youth in 1987 and 1988, respectively, confirmed that there was not a single girl in either of these batches. None of the female study participants had gone to ESBEC #22 after 1986. The only exception was a woman who went directly into university after studying Spanish for a year. One graduate reported that around 1994/95, no more women advanced to university from the pre-university program. This would coincide with the observation that there were no more women going to the Isle of Youth after 1986.

It is not entirely clear to what extent the lack of female students in later years was linked to female students’ pregnancies in the earlier years of the program. Statements by different administrators are conflicting on this issue: “There was also the issue of pregnancy which became a huge theme that got the political leadership worried, so they decided to limit the number of girls. ... It was a way to escape the problem, by not selecting them” (Danso, administrator). “The children thought that, because they were getting pregnant, we were not going to send more girls. That’s the perception of them, but they didn’t know. There was no policy like that” (Razak, administrator).

A somewhat more provocative explanation for the curbing of female student numbers came from one of the graduates:

The Cubans insisted on boys, that’s why girls didn’t go. The Cuban government asked the Ghanaian government to only bring boys because of the farm work. ... If

you visited the Namibian school, how come there were the same amount of boys and girls? (Gyasi)

A fellow graduate dismissed this claim as a “conspiracy theory”. In a sense, the graduate advancing this theory was contradicting himself: If there had indeed been substance to his theory, would then the Cuban government not have demanded the same from the Namibians whose students were also involved in work and study? Ultimately, though, the question of allowable numbers for male and female participants could only be answered through access to the respective Ghana-Cuba agreements, assuming the parties did not reach some tacit or verbal agreement on this matter. It is also possible that the decision regarding sending of male and female students was unilaterally taken by Ghana without any input from the Cuban side.

The pregnancies became an issue for the Ghanaians, regardless of whether this situation ultimately resulted in the decision to not accept girls into ESBEC #22 any more starting in 1987 (although this explanation appears to be the most likely scenario). Cubans dealt with teenage pregnancies through abortions which were legally available; however, this route was not open to pregnant Ghanaian teenagers since abortion was illegal in Ghana. The typical course of action was to repatriate the pregnant student, resulting in embarrassment to the student and her parents, as well as questions by senior program administrators. It is feasible that some pregnancies might have been prevented with proper reproductive health education; however, it was culturally impossible to accommodate the respective curricular changes since talking about contraceptives in class was anathema under the Ghanaian education system: “Talking about contraceptives, that was completely unheard of, unacceptable....” (Tawiah, teacher). Study participants

indicated that pregnant Ghanaian girls were sent home, but the Ghanaian boys who impregnated them were not. Likewise, male Ghanaian students who impregnated Cuban girls or women went unpunished. Although there might not have been an official, expressed policy as to cutting female children off the program after 1986, one administrator indicated that this was a decision reached at the highest level to prevent further teenage pregnancies.

Another administrator conceded that, right from the start, there was a gender bias built into the program: “The way we handled the program was not positive to the female gender” (Musah, administrator). Gender selection might have already happened at the family level: Ghana is a relatively moralistic society, and parents are likely to have been more reluctant to send a young woman than a young man on this program to a far-away country for a lengthy period of time. As showed in Table 1 on page 47, the school enrolment rates for male and female students in the year 1980 showed a distinct advantage for boys, suggesting that secondary education for girls was much less common even in Ghana. It can be conjectured that families which did not place equal value on girls’ education would have therefore been unlikely to send a female child to the Isle of Youth program. One administrator noted that “few people wanted to send their daughters to the program. In Ghana, people were likely to favour their sons. Traditionally, if you have boys and girls, in Ghana the boys would always be favoured” (Danso). One graduate explained the situation in Ghana regarding female education at higher levels:

Some parents are pulling their children out of school at early stages because they say if you stay long in school, you don’t get married ... you become a useless woman or a woman without a husband. ... some families will not allow their

children, their female children, to go up to like the university level. ... Most women back at home, will think that women are to stay home and take care of kids and cook ... An educated woman in Ghana will not sit down to work for a man, take care of .... And when we were at school, the women proved this ... the tiny group of women we have, were doing the same thing – just like us. ... I know my colleagues who were schooled in Cuba, if they have a daughter ... I don't think they will ever, ever stop that child from acquiring any level of education. ... In Cuba, we've seen it, and that should serve us back home ... In Cuba, is equality, for women ... and in my school, we had women all over, who were excelling in all aspects and they were strong, just like the men. Even stronger than men. (Kweku, graduate)

Even today women are still vastly underrepresented at the postsecondary study level in most African countries, with the gender gap most pronounced in the sciences and professional fields (Zezeza, 2003). All the more, it would have been important to allow more female students into the program in order to start closing the gender gap. Richmond (1985) cited examples which proved that discriminatory practices were still common in Cuba in the mid-1980s in spite of 25 years of educational democratization. Nevertheless, this study shows that the problem of discrimination in this case probably lay more with Ghana than with Cuba, and that the graduates interviewed saw Cuba as a place of enhanced female equality.

The competitiveness of the program in regard to university access, coupled with the uneven gender distribution, resulted in some gender competition. One female graduate noted that only one Ghanaian woman ever studied human medicine under the program

(and that person did not go through the Isle of Youth program, but through some other scholarship arrangement between Cuba and Ghana). Some harassment of the female students by male students was also reported:

I think more chances should have been given to the ladies. ... Some of the challenges we faced was when the boys realized we were doing better than they do they started giving you all sorts of names. They try to discourage you. They try to pull you down. ... They would try to give you all sorts of names, something for you to feel uncomfortable, so that they can take the lead. (Beduwa, graduate)

There appear to have been few or no initiatives to increase the participation of women and their success on the program. If there were any such initiatives, nobody talked about them during the interviews.

### **Return, Non-Return and (Re)Integration into Ghanaian and Other Societies**

There is a dearth of exact statistics on how many graduates from Cuban educational programs live in Ghana, and how many live outside the country. Estimates by graduates and administrators vary from “the vast majority” up to “99 percent” being back in Ghana. However, the latter figure seems exaggerated and certainly does not capture those who came back from Cuba and left later because the government did not track these graduates over time. Some graduates also expressed the opposite opinion, stating that the majority of graduates live outside Ghana. Apart from anecdotal evidence, it is not currently possible to obtain any concrete data in this regard.

The ESBEC.COM website provides a useful tool with regard to graduates’ locations. As per April 20, 2008, a total of 224 graduates had registered with full name and location as members on the website. Their current location is self reported: A total of

103 members reported living in Ghana, seven members live in other parts of Africa, 28 members live in the Caribbean region, and 86 members reside in other parts of the world, out of which 83 live in industrialized countries (primarily the U.S.A. and the U.K.), with two graduates living in the Middle East, and one graduate living in China. These figures have to be treated cautiously. It is quite likely that those living in other parts of the world feel more of a need to stay connected via this medium and may thus be overrepresented among the ESBEC.COM members in relation to the number of graduates living abroad versus graduates living in Ghana. Also, graduates living and working in remote areas of Ghana frequently have little or no access to the Internet and are thus less likely to register as members.

#### **(Re)Integration: Culture and Family**

Almost every returning graduate that was interviewed reported having faced challenges with respect to reintegration into the cultural and social fabric of Ghanaian society. After spending most of their teenage and early adult life in Cuba, many graduates had adapted to the liberal Cuban way of life, described as permissive by Ghanaian administrators. The expressive Cuban style and mindset clashed with the more moralistic and rigid Ghanaian society. Graduates and administrators reported that the returnees were not any longer familiar with Ghanaian notions of family relations and patterns of respectful behaviour both inside and outside of family relationships, and they were frequently at odds with the values held by family members. Graduates from Cuba were used to discussing, asking lots of questions and speaking their opinion, which was more uncommon in Ghanaian society. The Ghanaian Embassy in Cuba apparently conducted some debriefing with the returning students to prepare them for re-entry; however, it

would be unrealistic to expect that people can shed overnight the habits, behaviours and mindsets they have acquired in the course of many years. Anarfi, Kwankye, and Ahiadeke (2005) described this phenomenon in the context of return migration, arguing that the frustrations encountered by returnees due to their alienation from the home culture could ultimately result in a push to return to the countries where they previously resided.

A number of graduates and administrators also indicated that the returning students' families had unrealistic expectations regarding their children's sojourn abroad in that they anticipated the graduates to return with some valuable material possessions. Participants reported that it is very common for Ghanaian parents to assume that their children will be able to acquire a certain level of material wealth while studying abroad.

So, after four, 12 years, 22 years, 15, 10, five years of staying out of Ghana, if you have been in a country like Cuba, they are not looking at you as coming from Cuba, they are looking at you as coming from abroad. So when you come home, they are expecting to see you, within a couple of weeks, ... buy a new car, then put in a building, some structure, in a couple of weeks after you arrive, because you did work, you accumulated some money, ... that's the mentality. (Kweku, graduate)

This expectation appears to be linked to what some participants described as a culture of consumerism, or a money orientation, in Ghana, which was at odds with the students' own mentality and mindset that had been formed by Cuban values. Many families obviously did not understand the nature of their children's study program in Cuba and were imposing unrealistic economic expectations upon them. For several graduates who could not find work immediately upon return to Ghana, the situation was actually even

worse: Not only did they have nothing tangible to bring back home, but they had to rely on their parents for subsistence – food and accommodation. This situation was difficult to accept after they had been raised in a very independent manner for so many years.

The same culture clash that graduates experienced inside their families also applied to other spheres of life, in particular the world of work. Clashes there occurred along several dimensions – work attitude, hierarchy, dress code.

The working attitude. Their approach to work was a very big problem for me because [in] Cuba we were trained to be results-oriented, society-oriented and not money-oriented. ... you come back and see people who are not ready to really put in what they do. And it was a culture blow for me. Too, the way we dress in Ghana here. ... They use your dress to judge your personality. ... In six months, I will be due for promotion to director. Now they've given me a letter, I have to start [appearing] in coat and tie. ... And they see old age as a title. So if somebody is older than you and you are working with them, it becomes a problem. (Botwe, graduate)

Botwe's observations are consistent with Tiemoko (2005) who claimed that returning migrants have problems integrating into work environments due to differences in commitment to work, work ethic, and professional practices, compared to their colleagues who had not lived abroad.

In many ways, the graduates who participated in this study seem to have found themselves caught between two worlds: Although most of them still felt primarily Ghanaian, they had adopted something of a Cuban persona which was almost immediately noticeable for people with whom they interacted. They had longed to go

home for so many years (see Figure 3 below of a students' drawing in ESBE #22), but once they got there, the excitement of many graduates quickly abated when they started to fully understand the new reality in which they found themselves. The study's findings regarding cultural adaptation and family pressure are consistent with the results of Bland's (2001) study of African students who studied in higher-income countries. In the following sections, I will discuss further challenges that the graduates encountered upon leaving Cuba.

**Figure 3 Students' drawings: Home Sweet Home**



**(Re)Integration: Accreditation**

Accreditation issues impacted the graduates in two main ways: First, there were a few disciplines that required professional accreditation, and second, those graduates who wished to pursue further studies had to deal with academic accreditation issues. The extent to which certain graduates were affected by accreditation problems depended on their credential and on their location after leaving Cuba. Of those who returned to Ghana, the holders of polytechnical diplomas were most severely impacted. The first graduates from Cuban polytechnical institutions returned to Ghana in the late 1980s and early 1990s where they found themselves caught up in the ongoing debate around polytechnical credentials. Their diplomas were not recognized at the higher education level and were frequently seen by potential employers to be little more than a grade 12 education. Likewise, if these graduates wanted to upgrade their education at a university, they regularly encountered situations where transfer credit was not provided for their Cuban-based diploma, and they had to undergo the same training as Ghanaians entering such programs directly from high school. One polytechnical graduate noted that, “the education or academic system, they did not let us go to university. They didn’t recognize the diploma that we got from Cuba. The recognition for entry to the university, I mean” (Oko). This graduate had to obtain the Ghanaian secondary school advanced level qualifications before even being accepted to do a first degree at a Ghanaian university.

Graduates who attended a polytechnical institution in Cuba during the final years of the Isle of Youth program faced a slightly different challenge. Because of the impending closure of most schools located on the Isle of Youth, some schools collapsed their program into a shorter timeframe. One graduate attended a polytechnical institution on

the Isle of Youth for a four-year diploma, but the curriculum was compressed into two years. However, it was very difficult for the students to learn all of the content in half the time originally allotted, so when this graduate returned to Ghana, he attended a bridging program at a special school in Takoradi in Ghana's Western Region. After one year, graduates received a Ghanaian National Higher Diploma which essentially put them in a somewhat better position than the ones who returned with a finished Cuban polytechnical credential.

As I mentioned earlier, Ghana had only three polytechnical institutions when the Isle of Youth program started. Polytechnical credentials were not well understood in society into the late 1990s. In the context of an educational reform program in mid-1997, the Ghanaian Ministry of Education, National Accreditation Board, and National Council for Tertiary Education (NCTE) deliberated accreditation procedures for the Higher National Diploma (HND) awarded by the country's polytechnics. This credential supposedly ranked next to a first degree, but was not recognized as such by employers (Polytechnics can't award degree now – ministry rules, 1997). The NCTE conceded that there were problems placing HND graduates in the civil and public service sector, whereas they were apparently recognized by private-sector organizations (Council on Tertiary Education throws more light on HND programme, 1997). In October of the same year, the NCTE reported that the problem of placing HND graduates in the job market had been solved (Higher National Diploma to be recognised, 1997). It is not difficult to imagine that graduates returning to Ghana with a Cuban polytechnical credential met with a lack of understanding regarding their educational attainment given that Ghanaians apparently had difficulties placing graduates from their own polytechnical institutions.

In regard to professional accreditation, university graduates faced few issues in Ghana. Although individual experiences differ slightly, graduates from human and veterinary medicine programs and university-level accounting programs generally encountered few challenges and received their professional designations more or less promptly after returning to Ghana. A veterinary medicine graduate reported registering with the Ghana Veterinary Council immediately after return without any problems. While other graduates from the same program did not explicitly mention this process, they all reported being employed through the Veterinary Services Directory very quickly upon return, thus suggesting that they also received their formal accreditation. Graduates with engineering-related credentials did not need to undergo a formal government-level accreditation. I therefore discuss the issues encountered by those graduates in the next section on (Re)Integration: Employment.

The situation was somewhat different for those who went to the Bahamas from Cuba. Accreditation for graduates from veterinary medicine programs was not easy to obtain:

The actual problem here is that they are not recognizing our title, that's the problem. ... I applied in places – what did they tell me? For us to give you a licence to operate you have to go to a university in the United States and bring me any paper, that's what my minister told me. Bring me any paper to show that you did a course in the United States, and you passed, and I'll give you a job. Right? That's what I mean – they told me point blank. (Kweku, graduate)

Another veterinary graduate pointed to the arbitrariness of Bahamian regulations around licensing:

You can't practice because you studied in Cuba, they brought Cubans, doctors, to come and do some work here. ... Here is a case – there is a brilliant guy here, qualified, we don't want to allow him to practice. There we bring two Cubans to come and to do work here. I mean, it doesn't compute. (Akwesi)

Kweku mentioned similar issues around Bahamian paradoxes regarding accreditation:

I had an argument with the minister because I told him you have Bahamian students in Cuba today, so when they come back, where are you going to put them? ... and he [the minister] was telling me about livestock farming here. And that is my specialty, that's what we generally, basically did in school – livestock, because in Cuba we don't have that much dogs and cats ... we have plenty of cows, and sheep, goats. ... They said they wanted to bring expertise from Cuba ... And he is still – bring me anything from Canada or the United States, and you have a job.

Engineering graduates also faced challenges in the Bahamas although there was no indication of a professional accreditation or certification process for engineers in that location, either. Among the professional groups of which I met representatives, pharmacists appeared to be most directly working in their field in the Bahamas. One graduate intimated that there were no professional accreditation or certification standards for pharmacists. Furthermore, it appears that obtaining work in one of the pharmacies was facilitated by earlier Ghanaian graduates from the Isle of Youth program who had settled in the Bahamas, and some of whom were owners of local pharmacies.

Finding employment in the Bahamas was likely also problematic for the Ghanaians due to existing work permit regulations which called for preferential treatment for Bahamians. As one graduate in Nassau explained, companies had to ensure through their

recruitment processes that hiring a person with a different citizenship did not displace a Bahamian qualified to do the job.

**(Re)Integration: Employment**

Regardless of whether there was a formal professional accreditation or certification process, finding employment was closely linked to the recognition of Cuban credentials, as discussed in the previous section. Gaining employment, in turn, in conjunction with other factors, was linked to the graduates' decision to go back and to stay in Ghana, as I discuss in more detail in the section on brain drain and brain circulation later in this chapter.

Participants of this study reported that graduates who returned to Ghana had to complete one year of National Service. Most of the graduates whom I interviewed in Ghana found adequate employment within three years after their return, and several of them found employment almost immediately when they returned. The majority of graduates interviewed who are now living in Ghana, regardless of whether they had experienced challenges upon their return, are now gainfully employed in positions directly related to their field of study. The overall level of professional satisfaction in Ghana appeared higher than that encountered in the Bahamas. The most obvious reason for this higher job satisfaction is the higher incidence of graduates in Ghana working in their field of expertise, rather than in a position that is only peripherally related to the graduates' training, as is the case for a number of graduates in the Bahamas. The status of Ghanaians in the Bahamas as immigrants may also contribute to their lesser professional satisfaction since they are constantly, overtly or covertly, subjected to the common

discriminatory perceptions and/or practices that immigrants frequently experience in their host countries.

Study participants reported their impressions that the breadth of the polytechnical graduates' training, and also that of the university graduates, was poorly understood by potential employers in Ghana. However, they provided various examples to demonstrate that, once the graduates had managed to find a job in their field, they were quickly able to establish and prove themselves. The graduates I interviewed felt that their training and applied skills were in several aspects superior to those of their Ghana-trained colleagues. This aspect was highlighted by many participants. One particular story told by several of the participants serves well to illustrate the level of the graduates' practical skills:

Well, the classical case of ... you've heard of Tamale, Tamale is capital of the Northern Region. There was a situation there, in the hospital, the hospital mortuary had broken down. For several years. The engineers thought if they had, you know, if some chap working there installed a new set of equipment, which would cost, you know, something like an arm and a leg. Then this polytechnic student who did three years of his education, after three years spent in Cuba, was on National Service there. He looks at this equipment and says 'We can repair this thing.' So what – the engineers, the university graduates, the engineers have declared it hopeless. Okay, so somebody thinks, okay, give us an idea, give us an estimate. Give us an estimate, and it's like – peanuts. So, then the hospital director decided, let's give it a try. They give him the money, he goes and buys the parts, gets back to Tamale, and within a week, the situation is alright. Everybody thinks, that something, this one

works after all. And then, that's how they established themselves. (Nsoah, administrator)

These kinds of “cataclysmic events” that helped the graduates getting their Cuban credentials to be seen in a different light and receiving professional recognition were reported by several study participants. Another illustration of such an event was provided by one of the veterinary graduates:

So I initially did my National Service with the Veterinary Services Department, and then – something that happened that is very important to mention here was ....

There is a surgery called hysterectomy ... I remember one afternoon all my senior doctors went for lunch, and somebody came in and wanted this pet spayed. But he wanted it at once, done at once, because he was traveling. And I quickly organized, prepared the theatre ... when a case comes like that, I realize that the other doctors want to organize a team to go in and do the surgery. Meanwhile, in Cuba, this is just a very simple, technical operation. So, I then organized myself and prepared my surgery. When the senior doctors returned from lunch and saw me there, the National Service personnel, doing a serious surgery, then they started wondering what was going to happen. Some were apprehensive, a whole lot of things, but I didn't mind them, and I didn't mind surgery, it went on very well, and I even did it in record time. They normally take a longer time to do it. And then the pet did very well, recovered well, and they were surprised. So there, I then added a mark to the Cuban training. (Adeben)

Of the group of graduates I interviewed, those who had the most difficulties finding employment were the first ones returning in the late 1980s with polytechnical

certifications. As one graduate put it, they “were left in the middle of the sea” (Oko). This situation is, in many ways, one of the most surprising and paradoxical aspects of the graduates’ experiences with the Isle of Youth program. As indicated earlier, it was exactly the technical/vocational, mid-level professions which the program primarily targeted. The situation described by the graduates and former administrators is reminiscent of Ouaked’s (2002) concept of excess supply of skilled labour as measured against the availability of employment opportunities, and not against the need for such skilled labour. Although the designers of the program had presumably correctly analyzed Ghana’s needs and structured the program accordingly, the country’s employment sector does not appear to have been ready to absorb the Cuban-trained polytechnical graduates. One of the peculiarities of the program appears to be that it built up human capacity, but not the corresponding infrastructure in Ghana, a situation that seems to have resulted in the types of misperceptions with which polytechnical graduates were met.

Graduates even encountered difficulties finding suitable placements for their National Service. One administrator explained how he had organized seminars for government departments and ministries to help them understand the type of skilled labour that was coming back from Cuba, and how these graduates could be of benefit in government placements. It came as a great shock to this person when all but one of the suggested postings were rejected by the respective employers. Without a National Service card which the graduates received after successfully completing their year of service, they were unable to look for further employment. The National Service Scheme was first established in 1969 through an Act of Parliament, and was re-enacted in 1982 by the PNDC under the National Service Act of 1980 (Ghana National Service Scheme, n.d.).

The administrator's report about the graduates' rejection is particularly noteworthy in light of the National Service Scheme's professed objectives regarding national development: to fill labour shortfalls, to provide staff for rural development and rural communities, and to make graduates aware of national and social problems (Ghana National Service Scheme). It appears that the type of education the returning graduates had received in Cuba would have made them a good fit with these objectives.

There are various possible explanations for the lack of understanding regarding these credentials among employers: As I have explained earlier, doubts about the quality and relevance of the graduates' Cuban education appears to have played a role. At the same time, study participants also indicated that employers lacked understanding of certain professional career programs that were available in Cuba, but did not exist in Ghana. One chemical engineering graduate recalled that he had a difficult time getting accepted for National Service by the Ghana Standards Board because he had done his final project in Cuba on aspects of sugar production. The Board felt that he was inadequate because Ghana was not producing any sugar. It apparently did not occur to this employer that the graduate would have acquired transferable skills during his formational years. This kind of perceived narrow-mindedness, compounded by negative perceptions of an education from a country in the Eastern Bloc (as discussed in more detail in the next section), contributed to causing some graduates difficulties in their job search in Ghana.

While medical doctors amongst the interviewees, just like veterinarians, reported having generally had few problems finding employment, holders of medical specializations encountered some issues since physicians were able to go into

specializations much more quickly in Cuba than in Ghana. A graduate in laboratory medicine talked about taking a National Service position in a hospital that had brand new lab equipment; yet, his supervisor did not allow him to connect and use the equipment. It was the graduate's perception that the supervisor was afraid to concede that a young graduate from Cuba might have better and more specialized knowledge than his supervisor. Other graduates encountered similar issues in regard to alleged "protectionism" by those who might have felt threatened in their positions by younger people with better qualifications. Several graduates alluded to favouritism, the existence of strong informal networks, and the need to know somebody to even get a job interview in Ghana. These challenges may partly be understood in the context of the strong position of the bureaucratic and professional elites that would conceivably have been reluctant to allow penetration by the graduates from Cuba, many of whom did not have any ties with the existing elite.

Some graduates also mentioned that they had not learned how to market themselves properly in a job interview and later on a job. They saw themselves as having little business acumen and felt that employers treated them as workers that could be loaded up with any type of work without complaining – a feature that, according to the graduates, employers often associated with a Cuban education.

When we came back, most of us did not know how to compete for jobs. ... Because when we go for jobs, you just go with the mind that I want to perform, results, and this ... just going ... and work like a donkey. (Rahman, graduate).

This lack of confidence in competing for jobs may be attributed to the graduates' preparation for a communist economy that does not call for job competition. The few

political science courses they took in school may not have prepared them sufficiently for living in a society that follows capitalist principles.

Once some graduates had established themselves in positions, they were able to create their own small networks and help other Esbecans find employment. This is one of the reasons why clusters of graduates can be found in certain work environments. For example, at Ridge Hospital in Accra, there are program graduates with different professions, both medical doctors and polytechnical diploma holders in the field of clinical laboratory. In another instance, I spoke with four graduates in engineering and science who work together in an export-oriented, privately owned fruit processing plant outside of Accra.

According to the former students interviewed, when the first graduates left Cuba and went back to Ghana, they expected preferential treatment and a governmental job offer. This was not entirely unrealistic from their perspective: They had been selected as the best students under a highly publicized program and spent their formative years in a country where the government provided jobs to its postsecondary graduates. Although it initially was a big shock when they understood the realities of Ghana upon return, the graduates I met in Ghana had all found a niche for themselves in various job sectors, both public and private.

Of the 10 graduates who spoke with me in the Bahamas, only two went home to Ghana before coming to the Bahamas. In one of these cases, the graduate completed his National Service and tried to find appropriate work afterwards, but was unsuccessful. In the other case, the graduate had difficulties finding employment adequate to his polytechnical diploma. He furthermore had family obligations in Cuba that finally caused

him to take up residence in the Caribbean. The other eight graduates with whom I spoke did not return to Ghana based on perceptions that they would not find employment there, or would have more opportunities in the Bahamas. Some also felt they could be of more use to their families back home by subsidizing the families from the Bahamas where the graduates were earning higher salaries.

Overall, the graduates in the Bahamas who participated in this study experienced more challenges with regard to finding employment in their field of study compared to those back in Ghana. I have already discussed the problems of veterinary graduates to become licensed veterinarians in the Bahamas. As a result, one graduate worked outside his area of training, and another one performed veterinary services normally provided by licensed veterinarians without receiving the requisite remuneration. None of the engineers with whom I spoke in the Bahamas worked in a job directly related to their field of studies. One chemical engineer taught chemistry in school, and another one worked as a sales representative for an international pharmaceutical company. As indicated previously, the pharmacists in the Bahamas seemed to have a better chance of working in their field.

The group of graduates in the Bahamas were subjected to the same misperceptions and stereotypes as their colleagues in Ghana, only that those barriers to finding employment seemed to not have abated over time to the extent that this was the case in Ghana. Although remnants of this mindset still exist in Ghana, several respondents noted that the situation had gradually improved. In the Bahamas, however, where the graduates face the added challenge of being immigrants in a third country, formidable obstacles to finding discipline-related work still exist for most professions.

**(Re)Integration: Perceptions of Eastern Bloc Education**

The graduates' problems finding employment were also to a considerable degree related to negative perceptions of their education and of credentials from a country in the Eastern Bloc. Since the time of Ghana's independence, education in the East had been a contentious issue:

You know, the first president was the president who sent 13 Ghanaians to Russia to be trained as doctors. And by the time they came back, his government had been toppled. So, when those doctors, those medical doctors came back, it was hell for them. Eventually some of them left the shores of Ghana. (Musah, administrator)

According to several former administrators and graduates, holders of credentials from any country of the Eastern Bloc suffered from the same stigma:

Nkrumah's government was sending people to Romania, to Bulgaria, to Soviet Union, Hungary, to learn. So, then to Eastern Germany. As they came back, we had this problem of that they are being discriminated. The West had a propaganda that Eastern technology was down-grade, low-tech. ... So when they came, they had to fight for their recognition. (Nsoah, administrator)

Another administrator indicated that salaries for medical doctors trained in the U.K. were higher than those for physicians trained in the Soviet Union. He saw this as paradoxical since he felt that the ones trained in the Soviet Union and in Cuba are the backbone of the Ghanaian medical system today.

The graduates who spoke with me – in Ghana and in the Bahamas - consistently reported having experienced discrimination based on their Cuban credentials, in spite of the scholarship program having been set up at the highest presidential level. Although Rawlings was still president when the majority of graduates returned from Cuba, the

political climate in Ghana had changed, as elaborated in more detail in the section on The Political Dimension. The graduates reported that they were frequently denounced as “Cuban spies”, “Rawlings kids”, or “Castro spies”. One graduate noted that a Cuban education was regarded with more suspicion than that from another socialist or communist country like China because of the special relationship between Cuba and the Soviet Union.

Word traveled quickly from Ghana back to those still in Cuba who felt discouraged by their colleagues’ negative reports of the return experience. However, only a minority of graduates appear to have initially decided to not return to Ghana because the alternatives were limited. Graduates were not permitted to remain in Cuba after the end of their study program. Once some graduates had established themselves in places such as the Bahamas, they encouraged others to go there, too. It should be noted that accounts of the returnees’ experiences were acted upon in different ways by different graduates. Although such accounts motivated some graduates with whom I spoke to seek their future elsewhere, others described how these “advance warnings” had prepared them better for their return and had actually mitigated against the frustration they would potentially encounter upon return to Ghana.

Several graduates in the Bahamas commented on the double discrimination they encountered based on ethnicity and their education. “As it is, if you be an African, who studied in Cuba, you have two, that’s two strikes” (Akwesi, graduate). “Two negatives ... can never be a positive. It can never be a positive” (Mensah, graduate). Another graduate with an Islamic middle name indicated that he never used that name because that would make him subject to a third stigma.

Blaud (2001) made the argument that discrimination played an important part in study abroad students' decision to return or not to return to their home country. His findings are borne out by the accounts of the Bahamas-based graduates I interviewed. It is difficult to ascertain from this study as to whether the bias that the graduates encountered ultimately served as an emigration push factor. I spoke with only four graduates who returned to Ghana and subsequently left. In two cases, the Eastern Bloc bias was not mentioned as a motivation for the emigration decision. In the two other cases, the decision was mostly related to problems finding suitable employment which, in turn, were partly linked to the Eastern Bloc bias that was also explicitly mentioned by these graduates. However, the accounts of the Bahamas-based graduates show that perception and anticipation of bias can be just as strong a push factor as actual experienced bias and may entice study abroad students never to return home.

The perceived superiority of European-derived educational programs is directly linked to colonial education systems. Nkulu (2005) and Samoff and Carrol (2003) noted that the educational institutions in Sub-Saharan Africa were designed as carbon copies of metropolitan universities. Tertiary institutions set up after independence still largely followed the same curricula and academic practices prevalent in the former colonizers' countries since truly authentic and indigenous education system can only develop over a sufficient period of time, in particular if foreign domination has been extensive. Although it is debatable whether education systems in socialist countries are any more authentic to the African context, several countries on that continent have found it worthwhile to collaborate with socialist countries for the strengthening and development of their own educational infrastructure and philosophies. It can be argued that education in socialist

countries, precisely because it is somewhat lower-tech, may be more relevant to African countries that find themselves at the lower end of the technology spectrum. This realization seems to have slowly taken hold. One administrator noted that the Isle of Youth program had gradually contributed to changing Ghanaians' perceptions regarding the value of education in socialist countries. He indicated that it was now recognized that those educated in Cuba had superior problem-solving skills and were not easily discouraged when they faced difficulties on the job. Although I did not interview any employers who may have corroborated or refuted this argument, the majority of interviewees spoke to this point, and there was wide consensus on the perspective advanced by the administrator above.

The feeling of strong friendship ties between Cuba and Ghana, as felt by most graduates and administrators I interviewed, is further illustrated by the students' spirited wall drawing in ESBE #22 (Figure 4 below).

**Figure 4 Students' drawings: Cuban-Ghanaian Friendship**



**(Re)Integration: Language**

One of the concerns of the program designers, as reported by the former administrators, was the possibility that the Ghanaian students would lose their English language abilities while in Cuba. During the years on the Isle of Youth, teaching of the English language by Ghanaian teachers was supposed to prevent this from happening. When the students moved to the postsecondary level, the Ghanaian teachers and administrators did not have any further control over the students' English language proficiency. Even before their departure, English had been a challenge for some students:

There is a culture of speaking broken English amongst the youth when they communicate. ... It was first used by people who did not know how to speak proper

English, mainly people who had not been to school. However, in the late 1970s and 1980s, it became very popular among the young people. (Danso, administrator)

This subcode was still observable amongst some graduates in the Bahamas when they communicated amongst themselves. It was interspersed with vernacular African languages and some Spanish, making it almost incomprehensible to an outsider. As to why the students used this subcode is unclear. It could just simply have been a way of easy communication between multilingual people who speak a breadth of languages, but do not speak any language in great depth. On the other hand, it could have also been an active resistance to the colonial language and a way of mutilating that language.

The graduates reported that, upon their return from Cuba, most of them spoke Spanish better than English, which resulted in some initial problems expressing themselves in English. They had, to some extent, forgotten the proper use of English which caused some doubts regarding their competence; however, the graduates interviewed indicated that catching up with the English language was an automatic process for most returnees. This process seems to have been more difficult for some than for others, which likely depended on their level of English proficiency before going to Cuba.

With respect to any language challenges encountered in their work environments, graduates in technical/scientific fields commented that the technical language does not differ a lot between English and Spanish. Graduates from automation engineering and accounting programs equally reported that language was not an issue since the terminology in their fields was almost universal. A pharmaceutical science graduate working in a pharmacy in Nassau had some problems with English brand names and the

English coding system that was not used in Cuba. This person indicated that, although the language of instruction at his Cuban university was Spanish, the pharmaceutical class was encouraged to buy books in English which this graduate was able to do with the money he received from the Embassy of Ghana in Havana. One graduate of automation engineering even indicated that he wrote his undergraduate thesis in English. Several graduates mentioned that English was the only subject where Ghana-educated or U.K.-educated graduates would have an advantage over the Cuban-educated ones.

Graduates in Ghana did not comment on the usefulness of their ability to communicate fluently in Spanish. The situation is slightly different in the Bahamas due to the proximity of countries where Spanish is the first language. One graduate in Nassau had worked for Spanish companies and was also tasked with communicating with workers from regions like Mexico or the Dominican Republic who were monolingual. The Spanish language skills also came in handy for the pharmacists who frequently had to fill prescriptions that Bahamians brought from Cuba where they consulted Cuban doctors.

Overall, it appears that graduates saw English language proficiency as much less of an issue than the administrators had originally feared it would be. Lack of English language skills did not appear to have disadvantaged the graduates in their job search.

### **The Political Dimension**

The study revealed that the Isle of Youth program undoubtedly had a considerable political dimension. As Assié-Lumumba (2000) so poignantly states, “implementation of educational reform is first of all a political problem rather than a technical one (as viewed by the World Bank and the IMF)” (p. 95). Based on the accounts of both graduates and

former administrators, it can be inferred that governmental support in Ghana for the Isle of Youth program, in particular as returning graduates were concerned, waned over the latter part of the 1980s and in the 1990s. Considerable resources had been put towards the design, preparation and administration of the program, whereas little to no resources appear to have been allocated for meaningful reintegration of the graduates. Based on extensive discussions with the participants, supplemented by some pertinent literature, I would explain this situation to a large extent by the socio-political changes that occurred in Ghana during the 1980s. As outlined in the literature review, the first Rawlings government found itself in a crisis in 1983, just when the Isle of Youth program started. Drought, bushfires, and low rainfall levels caused hardship and hunger during that year. The same year, Ghana received an IMF loan for its economic recovery program which came with the condition of adherence to certain criteria formulated in Washington that had not been part of Ghana's own economic recovery measures (Bentsi-Enchill, 1984). In an article in *West Africa* in April 1984, Garbrah quoted a Filipino journalist who equated the World Bank/IMF loans scheme with "colonisation without an occupation force" (¶ 5), arguing that dependence on such loans would lead Ghana to abandon its strategic national objectives. Later that year, *West Africa* published an article that dealt with the increasing costs of education, outlined the costs of tertiary education over secondary and primary education, and discussed the introduction of fees for tertiary education. The idea of cutting tertiary education budgets to release money for lower education levels was closely linked to Western development paradigms in the 1980s and 1990s, as espoused by the World Bank.

While the Isle of Youth program was underway, the Ghanaian government's initial socialist economic orientation changed to a market-based model according to the prescriptions of the IMF's structural adjustment program (SAP). The SAP limited the government's ability to create jobs and thus hindered the graduates' integration into the Ghanaian job structure. At the same time, Ghana became the classical example of a postcolonial, neoliberal success story in the West.

The government, at the time it was sending these young people there, was socialist oriented. ... The thinking was that the state was going to pick up the structures of production, and therefore they were going to put in place mechanisms to absorb, you know, who came back. ... But by the time the first groups were coming, then we had adopted an IMF/World Bank structural adjustment program. And one of the conditions or prescriptions was that the state should gradually distance itself from the means of production. ... Once we had adopted the underlying principle of the structural adjustment program, then the state couldn't absorb these graduates easily or readily. (Nsoah, administrator)

A few graduates expressed their impression that this situation was exacerbated by the fact that, in their opinion, finding a job in Ghana in the public sector is closely linked to one's political affiliation. One graduate explained how he regarded this to be different from a country like the United States where the best surgeon would get a job regardless of whether he or she was a Democrat or a Republican. These few graduates felt that in Ghana, an individual's politics matter in terms of the job search. Although it is not possible within the constraints of this study to assess whether these graduates' assessments are fully reflective of the reality, the circumstances described may be related

to the centralized role of the state in many postcolonial African societies, including Ghana. Thomson (2004) described these states as characterized by *clientelism*:

A largely instrumental political relationship between an individual of higher socio-economic status (the patron) who uses his own influence and resources to provide protection or benefits, or both, for a person of lower status (the client) who, for their part, reciprocates by offering general support and assistance to the patron. (p. 127)

In such a system, the distinction between bureaucrats and the political elite becomes blurred, and close affiliation with the ruling political elite may lead to economic rewards (including jobs).

As reported by several study participants, anti-revolutionary elements had agitated against the Isle of Youth program from the start and discredited it as a political rather than an educational program. Over time, the bureaucracy appears to have adopted some of these views as the influence of Western modes of thought and Western policy prescriptions became more prevalent in politics and society at large. According to one administrator, the Isle of Youth program had the potential to teach young people self-reliance, independence from external rule and from over-reliance on an import economy – values badly needed in Ghanaian society that had just emerged from colonialism and was now in danger of renewed external control by the international financial institutions.

We are annually importing Macmillan-type science books<sup>2</sup> – a big budget. .. But why do we keep importing when we can build a department here? ... And we are always importing from our side, we have devaluated our currency. ... If the currency is going to remain stable, then we have to do things on our own. Create

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<sup>2</sup> The person is referring to a large U.S.-based group of publishing companies that produce books for classroom use.

our own production. ... So that is what the Cuban educational system taught them. Make use of what you have. ... our country is structured on the basis of Western concepts. (Razak, administrator)

The interviewees' accounts indicate that little attention was given to students returning from the program, in particular after the first few years of operation in the 1980s. The exception appears to have been when there was a newsworthy and high-profile item that rendered a reference to the Ghanaian students in Cuba expedient. In September of 1997, for example, Ghanaian president Rawlings hosted the second Africa-Cuba solidarity conference during which he strongly criticized the U.S. embargo against Cuba and condemned the Helms-Burton Act in the strongest terms (Ghana against United States embargo on Cuba – Rawlings, 1997). The Helms-Burton Act was passed into law by the U.S.A. on March 12, 1996. It constituted a violation of international law under the regulations of the World Trade Organization in that it curtailed the free flow of goods and investments beyond the original bilateral embargo imposed by the U.S.A. on Cuba. At the same time, the law tried to prevent foreign companies from investing in Cuba by threatening legal action against foreign companies or individuals that were commercially linked to properties which the Cuban Government expropriated from U.S. citizens after the Revolution in 1959 (Roy, 2000; Wikipedia free online encyclopedia, 2007, December 16). The Act thus vastly curtailed the ability of non-U.S. companies to do business with Cuba and with the U.S.A. At the solidarity conference, a minister of state lauded Cuba's internationalist orientation as demonstrated by the hosting of thousands of African students, including Ghanaians, who took courses in a variety of fields and returned to contribute to their respective country's development (Ghana against United States

embargo on Cuba – Rawlings). Just two weeks prior to the conference, the media reported on the return of 33 graduates from Cuba, accompanied by the Ghanaian deputy minister of education and a technical committee that had met with Ghanaian students in Cuba and praised their academic performance (Thirty three Ghanaian students return from Cuba, 1997, September 5).

Scathing criticisms of Cuba's educational assistance programs have always flourished. In the majority of cases, the critical voices assert that the primary motivation for such programs was an extension of Cuba's general policy towards Africa. Cuba's African policy was seen by some to aim at asserting Cuba's position vis-à-vis the Majority World and reducing Cuba's political isolation as it was vying with other nations for power in the newly decolonized or decolonizing countries against the backdrop of the Cold War (Benemelis, 1990). A somewhat more benign assessment of this relationship holds that "Castro quite innovatively turned one of the social successes of the revolution into an instrument of foreign diplomacy, to win friends in the less developed world" (Eckstein, 1997, ¶ 11). Richmond (1990a) neutralized this view "on the grounds that all education, everywhere, serves the function of socio-cultural reproduction in conformity with particular power structures and value systems: Cuba is simply more open and forthright about ideological formation than, say, developed or dependent capitalist states" (p. 68). Dueñas (2007, ¶ 4) stated that "they have tried to liken the Cuban internationalists to European and U.S. mercenaries.... In reality, the only thing that the Cubans have ever taken out of Angola – a country rich in diamonds and oil, making it the object of the imperialists' desire – was the bodies of their fallen comrades."

The interviews with former program administrators and program graduates implicitly confirmed Hammett's (2004) findings from his research into the co-operation between Cuba and South Africa in the health area; namely, that Cuban aid is provided without imperialistic ambitions and with the aim to build self-sufficiency rather than dependency in the receiving nation. Although I was unable to access any of the annual bilateral agreements, none of the administrators interviewed who had knowledge of the agreements' content mentioned any conditionalities attached to the Cuban assistance program. Rodney (1982) equally argued that all exploitative and extractive relationships between African and other countries were based on trade (and formerly imperialistic and colonial) links with Western Europe, North America, and Japan. He pointed out that "socialist countries have never at any time owned any part of the African continent nor do they invest in African economies in such a way as to expatriate profits from Africa" (p. 23). This stance was also confirmed by Gonzales (2000) who pointed to "the absence of economic, political or other conditionalities in the extension of assistance to Africa" (p. 318). The Cuba-Ghana collaborative program on the Isle of Youth was set up strictly as an education program, not as a political or militaristic program. One of the administrators noted that he would not have gotten involved at all if the program had had anything to do with the training of mercenaries. The program placed special emphasis on technical education, not on political or social education, or business and public administration. In fact, several of the graduates showed a pronounced lack of political interest which is possibly at least partly attributable to the absence of political science education during most students' formative years. Graduates, nevertheless, appeared to still be affected by the cloud that they see hanging over the program even today. This

impact is stronger in the Bahamas, a country that went straight from formal British colonial rule into foreign economic domination by the U.S.A. In the words of one graduate: “Bahamas follow order, they follow U.S., badly. Because what? The decision U.S. have taken against the people who study in Cuba, Bahamas want to take the same thing, but they are not in the same soup” (Akwesi, graduate).

Another distinct feature of the Isle of Youth program with a political dimension is the extent to which it built solidarity among peoples of different African nations. Since the early days of independence, Ghana has always been strongly interested in pan-African relations and unity. Kwame Nkrumah, Ghana’s first president, was a supporter of and theorist on African unity, and Ghana was a member of the Casablanca Group, one of a number of predecessors to the Organization of African Unity (Benemelis, 1990). The graduates saw the Isle of Youth program as having a strong pan-African component:

The point was that therefore... it was like to unify, to bring unity to some of these nations. Especially, if you look at Mozambique, Angola, South Africa, each of those in the 70s and 80s were countries with lot of civil wars and they had some kind of differences. So this, can you just imagine, some South African or Angolan, someone from Angola, having ... to live right along somebody from South Africa, ... you can see that program is truly unifying, brought a lot of unity for those Africans who are on that island. In some cases you realize that some of these students right now have represented their countries in the United Nations and have made or have recommended or made recommendations on other countries from what they learned about these countries, ... and they were able to push their program forward in the United Nations. (Kweku, graduate)

Another graduate commented on how the program had opened the students' thinking to the world. On the Isle, they met many people from different African countries, and contrary to the widely held Western perception that all of Africa is the same, the students learned a lot about and from other African cultures. For example, before coming to the Isle of Youth, students had known little about the Angolan Civil War that started after Angola gained independence from colonial rule in 1975. The Ghanaian students regularly interacted with students in other countries' schools during sports and cultural events, thus gaining broader intercultural understanding. One graduate spoke of "having built a universe on the Isle of Youth" (Gyamera).

### **The Colonial Legacy**

In order to adequately assess the results of my research in the context of the colonial legacy, it is helpful to first take another brief look at African education under colonial rule and during its immediate aftermath. Pre-colonial African education systems – both informal, indigenous and formal ones characterized by a clear distinction between teachers and students - were highly relevant to Africans and characterized by close links with social life; collectivism; and close integration of education and productive activity, intellectual and manual aspects of education (Rodney, 1982). All that changed under colonialism when the newly introduced school system trained a select number of Africans to serve at the lower levels in the colonial administration, or to staff the lower ranks of European companies involved in the exploitation of the continent (Rodney). One important aspect of the colonial educational enterprise was the neglect of those regions that had nothing to offer to the colonialists for exports; in the case of Ghana, these were the Northern Territories (Rodney).

Colonial education was an alienating experience for many Africans. Sometimes thoughtlessly, but more often deliberately, the colonizers applied curricula that did not have any reference to African conditions and confused the students with images and concepts that did not make sense to them. According to Rodney (1982), this practice ultimately resulted in those Africans with the most education being the most alienated from their own societies' realities.

As a result of this history, Makgoba and Seepe (2004) argued that there is still a tendency in Africa for people to seek intellectual inspiration and validation from the outside, rather than through building endogenous systems of knowledge. Several study participants commented on this issue: One respondent spoke passionately about the legacies embedded in Ghanaian society by the colonizers which led to an inertia regarding any movement for change. The person referred to it as "the colonial curse" (Razak, administrator). He described how Ghana, a country rich in resources (gold and minerals) and a favourable climate for growing vegetables, allowed Europe to extract raw materials at unfavourable terms and thus had made Ghana import dependent. Put even more bluntly, one of the graduates referred to the colonial legacy as an attitude where "we think we can't think. Blacks or Ghanaians. ... Like they don't have that frame of mind to say what they think. ... We don't own what we have" (Botwe). In essence, these respondents described the postcolonial scenario of a "colonial mindset" which Frantz Fanon had already identified in the 1960s as the direct product of many years of European oppression. "It's like you put a bird or birds into a cage, and locked them for about 20 years. Then you open them, to go, they even forgot that they have wings to fly. That's the situation we are in" (Razak, administrator).

Some students clearly recognized the need to overcome this mindset in order to truly move Ghana forward:

One of my teachers in high school told me that he could teach us how to think, but the only way we could make a real difference and change things was by changing the colonial mentality. ... We have to break the cycle of colonialism. ... Many of us did not experience colonialism when it was still in place. We have not practiced on how to overcome it. (Tieku, graduate)

Several graduates acknowledged their understanding of the links between the colonial mindset and the preference for Western degrees, in particular those from the U.K., Ghana's former colonizer. "It's ideology – everything from the West is of more value, of higher quality. .... If you have a degree from Cambridge or Oxford, they are more valuable, they are discriminating against graduates who have a degree from other places" (Tieku, graduate). "There is still this thinking, you know, Great Britain, sort of the motherland, whatever comes from there is somehow more acceptable, must be better, somehow. And that is the mentality in Ghana, that was the mentality in Ghana" (Kweku, graduate). In the Bahamas, the preferences appeared to be more skewed towards the U.S.A., due to the neocolonial relationship that has developed between the two countries: "Everything that comes from U.S. is better than anything else" (Akvesi, graduate).

The secret behind the world in here is – there's a fast track of money making. ... it doesn't matter what degree you hold, whatever you brought here, so long as you can sail through and get somebody to just give you a spot, and you became someone. ... So you realize that the foreigner is really the one in control. (Kweku, graduate)

Several graduates discussed how, in their assessment, foreign direct investment as well as the advanced training of Ghanaians in industrialized countries worked to the detriment of Ghana's development by perpetuating the dependence on other countries for equipment and consumables.

Once I settled down in my hospital ... when we send people out for in-service training ... specialties, it happens that they are attached to those countries, that, when they come [back], they want a particular unit that you are operating changed. ... they want to bring in everything from that particular country. The chief executive of the hospital, for instance, what happens is that he is trained in the U.K., and he opens up for the U.K. companies who came to my hospital. (Oko, graduate)

Likewise, the group of six graduates with whom I had an extended discussion on this topic reported a tendency for foreign companies operating in Ghana to employ their own people as expatriates, rather than using local skilled labour. "Any time our government – Third World countries, not only Ghana, are negotiating for those packages coming, like we will be giving you ... we are going to fund a project, and therefore we are going to use our people" (Adeben, graduate). One graduate advanced the view that in construction engineering, most jobs go to foreigners because the construction firms are all foreigners, and they have a tendency to employ their own engineers. According to this interviewee, if Ghanaian firms compete for construction contracts, they often simply subcontract to foreign firms once they win the bid.

These perceived practices, which are embedded in the graduates' understanding of the postcolonial environment in Ghana, stand in contrast to the way Cuba is trying to prepare its citizens for life in a postcolonial society. Breidlid (2007) argued that

Compared with other developing countries, Cuba has taken an educational course that transcends the dependency and colonial legacy of many other countries in Latin America, Africa and Asia. In terms of philosophical foundations, historical legacy and language the Cuban educational system rests on indigenous principles. The textbooks are produced in Cuba and are distributed to all pupils in all schools in the country. (pp. 627-628)

Although Breidlid also acknowledged the ideological underpinnings of discourse production in Cuba, he nevertheless saw the Cuban curricula as being qualitatively different from the modernist educational discourses resulting from colonial relationships in many Sub-Saharan African countries. The modernist Western discourses centre on concepts of individuality and learning for oneself. Cuban education, which is grounded in a socialist discourse, has a stronger focus on the collective:

People [in Ghana] do not see the nation as a whole. I don't see that kind of [inaudible] that I used to see over there [in Cuba]. It starts from the school ... that students learn the values ... about their own country. I mean to love and to work for their country. (Nyamekye, graduate)

The respondent saw this situation in Ghana as linked to the country being an artificial construct of colonial powers and the partition of the continent by Europeans which has prevented a true sense of a Ghanaian nation from evolving. Ways in which the Cuban education might have been relevant to development issues in Ghana are the subject of the next section.

## **Development Issues**

The Isle of Youth program exhibited the features contained in several recommendations and policy prescriptions on development in a postcolonial and South-South context, made by various scholars and organizations. I noted, in particular, that the majority of these recommendations were made while the program was already well underway, or even after the program had formally ended. I interpret this as an indication of how far ahead of its time Cuban thinking was with respect to educational principles and horizontal models of development assistance.

Hassan (2000) and Okpaku Sr. (2000) called for harnessing the capacity of existing scientific expertise in developing countries, and the capacity contained in those countries' most outstanding institutions and programs, towards assistance for other nations that are not as advanced in the respective fields. Cuba has been widely recognized, even in circles of political opposition to the island nation, for its achievements in the health and education sectors. It was therefore entirely appropriate for Cuba to offer educational assistance to African countries that had not advanced to the same levels of development of their postsecondary education systems. The educational philosophy prevailing in Cuba was particularly pertinent to countries that, just like Cuba, were dealing with colonial legacies in their education systems. Schuller (2000) and Woolcock (2001) argued that the formation of human capital alone is insufficient to address problems of development. They called for the concomitant development of social capital that would foster social cohesion and commitment to common objectives in people. The Isle of Youth program cultivated some of these principles: as evidenced by the accounts of study participants, the program's graduates appear to be a tightly knit community, and there are groups of graduates who meet on a regular basis in Accra (and likely in other Ghanaian locations)

to discuss issues of common concern. Even the graduates dispersed throughout the world are linked by the ESBEC.COM website that previously contained a discussion forum and now uses an active blog system for topical discussions, announcements, and as a means for widely scattered graduates to find each other and connect with one another.

As outlined in the literature review, the World Bank significantly cut support for education programs in developing countries over the 1990s, with disproportionately high cuts being applied to the tertiary sector (UNESCO, 2004). The Isle of Youth program provided a counterforce to that trend by focusing on the secondary and postsecondary sectors, rather than the primary sector. When the World Bank eventually overturned its own prescriptions and conceded at the beginning of the new millennium that tertiary education does play an important role in development, Cuba had already extended development assistance in postsecondary education to other Majority World nations for over 20 years. A report by the World Bank in 2000 focused, among other things, on the need to educate people with increasingly relevant skills, in particular scientists capable of defining and addressing local problems and finding solutions that are appropriate to the context. This prescription came as a surprise, following on the heels of two decades of World Bank programming with a heavy primary/basic education focus. It is unclear how countries were to suddenly produce scientists who possessed these high-level skills after the World Bank had applied severe reductions to education spending at the tertiary level over the previous decade. In this context, the Isle of Youth program provided a stepping stone and compensated - within its design bounded by time and scope - for the lack of international donor assistance for first-level postsecondary education. Only after people have received a first tertiary credential are they able to move into advanced-level training

to acquire the types of higher-level problem solving abilities needed for a country's development.

In 1967 Sutton had already called for students to be infused with concerns for national achievement and development, rather than a focus on individual achievement and career orientation. Several graduates remarked as to how Cuban education encourages this kind of mental disposition in students:

And also incorporate some ... spirit of nationalism in the students. There's nothing like this compared to Cuba. ... They care more about their country ... and then, whatever they do, they do for the development of their country. Here [in Ghana] is like, I see it like ... I think people are more individualistic. (Nyamekye, graduate)

Another graduate noted that those outside Ghana were not any less concerned about the well-being of their country:

We have different ... each and every one of us ... but we are all patriots. ... We love our country, right, we can help our families better being here than being home. 'Cause our salaries, over here, you know, will help them more than if we were back home. Sometimes that's the basic question. (Etse)

On the other hand, one of the Ghanaian teachers who had taught in Cuba perceived many students' departures for other countries as evidence that the program had not achieved its goals with respect to national development.

So, the ideal of patriotism, and them being trained to come back to help your country, that wasn't achieved. Because most of them were looking for opportunities to go to other places, other countries, where they thought that things were quite rosy. ... And also, those who couldn't get that opportunity when they came back,

they find it difficult to settle, and sometimes they got a chance and left. But my understanding of the program was to make it so patriotic so that the students would be prepared to die for their country. (Tawiah)

This line of reasoning does not take into account the possibility that graduates actually did return with the intention to help their country, but left in frustration when they realized that they were unable to make the kind of contributions for which they had hoped. I will discuss this issue in more detail in the section on Brain Drain below.

The recruitment process which was modified and optimized over the course of the program also served as an awareness campaign to inform students' families about the program. As noted earlier, a few participants felt that education was not valued to the same degree by all parents and families, most notably in rural areas of Ghana where the concept of making sacrifices for the future returns of education was presumably more difficult to accept since the students fulfilled an important economic function in the household. One administrator noted that, "I visited many villages for my job, and there is no premium on education. ... Immediate needs come before some distant goal like education in those families. So, in general, people expected too much from the program in terms of economic results" (Akweteh). However, graduates also provided examples of parents with little formal education who supported their children going to Cuba to receive an advanced education through a full scholarship.

My mother was academically oriented, but there were certain financial constraints.

My dad was not in favour of me going to Cuba, he wanted me to stay. My mother saw the deeper picture. ... She only had basic education, but she knew the

importance of it. She saw the talent in me, and she understood that this was the best way to go for me to get an education. (Tieku, graduate)

Outreach to parents, especially in rural areas, was organized through the POSICAs at the district and regional levels. One of the organizers from Accra met the regional POSICAs twice a year for updates on the program, and the regional POSICA chairpersons in turn informed the district POSICAs. The person from Accra also talked directly to parents in village meetings several times each year.

Outside of the promising design and – albeit short – implementation of the program, the study participants pointed to a number of missed development opportunities. According to one former teacher, graduates are contributing individually to Ghana's social and economic development through community work and by helping the underprivileged in society. However, their impact at the broader societal and political level has been less noticeable so far. As one graduate put it,

We left Ghana on a government scholarship, ... we come back with knowledge. In Africa, one of the things that is needed, in Africa on the whole, is the application of knowledge, ... but if you go to Africa with the knowledge, and you're not allowed to exercise what you have learned ... what is going to happen? Nothing. ... If you have these, say about 1,200 students that went to Cuba all coming back, and then you find ways and means of integrating them into the society, to tell you the truth, that is going to make change. (Donkor)

Several graduates noted that it is not literacy education which is lacking most in contemporary Ghana, but social education – things like awareness of personal hygiene, reproductive health education, waste management, environmental issues, general social

awareness. These are areas in which the interviewees reported having received instruction during their formative years in Cuba. One graduate talked about the need to slowly and carefully change some traditions that got in the way of development. He mentioned, in particular, the role of ordinary citizens, the need for civil society to express their opinions if they had something meaningful to contribute, even if it went against the views of older people or people with more authority, which is currently still a taboo. Although the educational infrastructure in Ghana has improved overall since the early 1980s when the Isle of Youth program was devised, graduates still do not see it as adequate for the country's development. One graduate commented on the difficulties that university graduates still face in finding jobs commensurate with their education. It was also mentioned that contemporary Ghana is still facing a shortage of schools in certain remote areas, and that the lack of science education across the country is impeding Ghana's further development.

One graduate returned from his program with a broad development outlook and is currently putting his ideas into action.

We do a number of work to support organizations like ECOWAS [Economic Community of West African States]. ... We are doing a study to see how best we can set up a design to interconnect West African states so that they can start deploying certain applications. ... There was a south meeting in Havana where Kofi Annan was present, and there was a presentation by the Indian government on how the Asian ICTs improve the life of the rural communities. So he asked them how they can help Africans to do similar efforts in helping the people. And so that

brought about the initial MoU [Memorandum of Understanding] between Ghana and India because they chose to do a pilot in Ghana. (Mawuli)

This is the most direct example I encountered of a graduate applying his skills in the area of development. I should note, though, that I would have likely encountered more such examples had I been able to include graduates in remote rural areas of Ghana in the study.

### **Lessons Learned and Lessons Missed**

In this section, I have attempted to capture qualitatively what insights administrators and graduates have gained from their involvement in the Isle of Youth Program, and how, according to their perceptions, such insights have been applied in the Ghanaian context (“lessons learned”). I have also summarized where the participants saw shortfalls and felt that the possibilities offered by the Cuban system had not been acted upon (“lessons missed”). I would like to preface this section by reiterating that this study does not constitute a program evaluation, and that the lessons learned and missed are therefore based on the understandings and reported accounts of the study participants, as well as my interpretation thereof. Before discussing lessons learned and lessons missed from the Isle of Youth program, it is helpful to gain a better understanding of the current situation in relation to human development in Ghana. The following information and statistics are taken from the United Nations Human Development Report 2005 (UNDP, 2005).

Ghana’s rural population is considerably disadvantaged vis-à-vis their urban-dwelling counterparts. The poverty situation is improving in Accra, the capital city, but remains largely unchanged in the rural regions: Although the incidence of poverty in Accra is as

low as 2%, it is a disproportionate 70% in the rural savannah. Four out of five rural residents have no access to clean, piped water, compared with only one out of five urban residents without access to piped water. The following tables provide some detailed indicators regarding the human condition in Ghana, with comparative data for Cuba and Canada. Tables 6-10 have been adapted from UNESCO Human Development Report 2005, pp. 219-310 (unless otherwise indicated).

**Table 6 Selected human development indicators for Ghana 2003 with comparator countries**

| Type of indicator   | <i>Ghana</i>     | <i>Cuba</i> | <i>Canada</i>  |
|---|------------------|-------------|----------------|
| <b>Human development index (HDI)<sup>a</sup></b>          | 0.520            | 0.817       | 0.949          |
| <b>HDI rank out of 177 countries</b>                      | 138              | 52          | 5              |
| <b>Life expectancy at birth (years)</b>                   | 56.8             | 77.3        | 80.0           |
| <b>Human poverty index (HPI-1) in %<sup>b</sup></b>       | 35.1             | 4.8         | n/a            |
| <b>Rank out of 103 countries</b>                          | 62               | 5           |                |
| <b>Gender-related development index (GDI)<sup>c</sup></b> | 0.517 (Rank 104) | --          | 0.946 (Rank 5) |

*Note.* Dashes indicate that no data were provided.

<sup>a</sup>Summary measure for achievement based on three dimensions: long and healthy life, knowledge (education), and standard of living. <sup>b</sup>Summary measure for deprivation based on three dimensions: long and healthy life, knowledge (education), and standard of living. <sup>c</sup>HDI measures adjusted to reflect the inequalities between men and women (a value of 1.0 would signify no gender-related inequalities in the HDI)

Table 6 and some of the following Tables show that Cuba is much closer to a Minority World country like Canada on most indicators of human development than

Ghana, which ranks 138th overall on the human development index (HDI) out of a total of 177 countries. Life expectancy in Ghana is far lower than for Cuba or Canada. Over one third of the Ghanaian population lives in poverty. The gender-related development index (GDI) shows how countries fare with respect to their HDI if gender inequalities are taken into account. The figure for Ghana is slightly lower than its HDI, indicating the presence of gender inequalities.

**Table 7 Selected economic indicators for Ghana 2003 with comparator countries**

| <i>Type of indicator</i>                               | <i>Ghana</i> | <i>Cuba</i> | <i>Canada</i> |
|--|--------------|-------------|---------------|
| <b>Gross domestic product per capita<sup>a</sup></b>   | 2,238        | --          | 30,677        |
| <b>Share of income or consumption (%)</b>              |              |             |               |
| <b>Poorest 10%</b>                                     | 2.1          | --          | 2.5           |
| <b>Richest 10%</b>                                     | 30.0         | --          | 25.0          |
| <b>Ratio of richest 10% to poorest 10%<sup>b</sup></b> | 14.1         | --          | 10.1          |

*Note.* Dashes indicate that no data were provided.

<sup>a</sup>Purchasing power parity in US\$. <sup>b</sup>Inequality measure.

**Table 8 Selected public expenditure indicators for Ghana with comparator countries**

| Type of indicator  | Ghana       | Cuba          | Canada        |
|--|-------------|---------------|---------------|
| Public expenditure on education (% of total government expenditure)                | 1990: 24.3  | 1990: 12.3    | 1990: 14.2    |
|  | 2000-02: -- | 2000-02: 18.7 | 2000-02: 12.7 |
| Public expenditure on education – pre-primary and primary levels (% of all levels) | 1990: 29.2  | 1990: 25.7    | 1990: --      |
|  | 2000-02: -- | 2000-02: 43.0 | 2000-02: --   |
| Public expenditure on education – secondary level (% of all levels)                | 1990: 34.3  | 1990: 39.0    | 1990: 62.2    |
|  | 2000-02: -- | 2000-02: 36.8 | 2000-02: --   |
| Public expenditure on education – tertiary level (% of all levels)                 | 1990: 11.0  | 1990: 14.4    | 1990: 28.6    |
|  | 2000-02: -- | 2000-02: 17.5 | 2000-02: 36.2 |
| Public expenditure on education (% of GDP)   | 1990: 3.2   | 1990: 8.9     | 1990: 6.5     |
|  | 2000-02: -- | 2000-02: 9.0  | 2000-02: 5.2  |
| Public expenditure on health (% of GDP)  | 1990: 2.3   | 1990: 6.5     | 1990: 6.7     |
|  | 2002: 2.3   | 2002: 6.5     | 2002: 6.7     |
| Public expenditure on debt service (% of GDP)                                      | 1990: 6.2   | 1990: --      | 1990: --      |
|  | 2003: 6.3   | 2003: --      | 2003: --      |

*Note.* Dashes indicate that no data were provided.

With respect to public expenditure on various education levels, data for 2003 were not available from Ghana. Data for 1990, however, show that Ghana's spending on education as a percentage of total government expenditure was about twice the levels reported for Cuba and Canada, indicating that – up to that point – education seemed to

have been seen as a priority for government. Ghanaian educational expenditures at the pre-primary, primary, secondary and tertiary levels as a percentage of all education levels were comparable to Cuban figures. Canada, on the other hand, spent a much larger percentage of its overall educational budget at the secondary level.

Public expenditure in the education sector as a percentage of GDP in the year 1990 was 3.2% for Ghana; Canada reported about twice that figure, and Cuba's expenditure in this sector was about 2.8 times that of Ghana. Expenditures in the health sector showed a similar pattern, with Ghana spending about a third of the figures for Cuba and Canada calculated as a percentage of GDP. A disturbing feature of this set of data is the fact that the largest proportion of the reported public expenditure for Ghana went to debt servicing – about twice the figure for education spending, and 2.7 times the figure for health spending. It is not surprising, then, that in the wake of the education reform program of the late 1990s increased calls were made for the private sector to invest in education. In October 1997, the minister of education issued a direct appeal to the private sector, arguing that government's resources were insufficient to provide quality education for all (Minister urges private sector to help raise education standards, 1997, October 10). If there was any doubt as to where such demands ultimately originated, the minister made the remarks during the launch of a World Bank distance learning project. A district director of education in the Volta region had earlier that year made the same argument on the occasion of the seventh anniversary of a private school in his district (Educationist calls for private participation in education, 1997).

**Table 9 Selected educational indicators for Ghana with comparator countries**

| Type of indicator   | Ghana | Cuba | Canada |
|---|-------|------|--------|
| Education index <sup>a</sup>  | 0.51  | 0.91 | 0.97   |
| Adult literacy rate (% ages 15 and above) Year 2003 <sup>b</sup>                          | 54.1  | 96.9 | --     |
| Adult literacy rate by gender – 2003  |       |      |        |
| Female  | 45.7  | 96.8 | --     |
| Male  | 62.9  | 97.0 | --     |
| Tertiary students in science, math and engineering (% of all tertiary students 1998-2003) | 26    | --   | 20     |
| Children reaching grade 5 (as percentage of grade 1 students)                             |       |      |        |
| 1990/91   | 80.0  | 92.0 | --     |
| 2001/02   | 63.0  | 98.0 | --     |

*Note.* Dashes indicate that no data were provided.

<sup>a</sup>A country's relative achievement in both adult literacy and combined primary, secondary and tertiary gross enrolment. <sup>b</sup>Data refer to national literacy estimates from censuses or surveys conducted between 2000 and 2004.

The adult literacy rate for Cuba approaches 100%, whereas only slightly more than half of the Ghanaian population aged 15 and above is literate. For all levels of education, both Canada and Cuba score over 90% on the education index, whereas Ghana reaches only 51%. A closer examination of different gender-disaggregated indicators reveals

considerable inequality with respect to adult literacy: 62.9 % of men were literate in 2003, whereas the respective figure for women was only 45.7%.

**Table 10 Selected enrolment indicators for Ghana with comparator countries**

| Type of indicator  | Ghana | Cuba | Canada |
|--|-------|------|--------|
| Net primary enrolment rate (%)   |       |      |        |
| 1990/91  | 52    | 92   | 98     |
| 2002/03  | 59    | 94   | 100    |
| 2004 <sup>a</sup>  | 65    | 96   | --     |
| Net secondary enrolment rate (%)   |       |      |        |
| 1990/91  | --    | 69   | 89     |
| 2002/03  | 36    | 86   | 98     |
| Gross enrolment ratio for primary, secondary and tertiary levels (%) 2002/03 |       |      |        |
| Female   | 43    | 81   | 96     |
| Male   | 48    | 79   | 92     |
| Net primary enrolment 2002/03  |       |      |        |
| Female (%)   | 53    | 93   | 100    |
| Ratio of female to male  | 0.81  | 0.99 | 1.00   |
| Net secondary enrolment 2002/03  |       |      |        |
| Female (%)   | 33    | 86   | 98     |
| Ratio of female to male  | 0.85  | 1.00 | 1.00   |

|  |      |      |      |
|--|------|------|------|
| Gross tertiary enrolment 2002/03   |      |      |      |
| Female (%)   | 2    | 39   | 66   |
| Ratio of female to male  | 0.46 | 1.34 | 1.34 |
| Enrolment in technical/vocational programs/upper secondary 2004 (%) <sup>b</sup> | 6    | 58   | 7    |

*Note.* Dashes indicate that no data were provided.

<sup>a, b</sup>Source: UNESCO Global Education Digest 2006.

Enrolment rates at the primary level for both Cuba and Canada exceeded 90% with improvements between 1990/91 and 2002/03, whereas Ghana reached only 59% primary enrolment in 2002/03, but climbed the following year to 65%. At the secondary level, the picture is much bleaker: Canada and Cuba had secondary enrolment rates of 98% and 86%, respectively, in 2002/03, but Ghana's secondary enrolment rate hovered at 36%. Even more telling are the figures for children reaching grade 5: In Cuba, the percentage for this indicator rose from 92% in 1990/91 to 98% in 2001/02, whereas the respective indicator for Ghana actually fell steeply from 80% in 1990/91 to only 63% in 2001/02. This statistic is an indicator that the achievement of even basic levels of education for all Ghanaian children has not yet been realized.

Enrolment statistics in technical and vocational programs at the upper secondary level are also illuminating. Ghana's 6% compare poorly with the 58% reported for Cuba. The figure for Canada of 6% is an anomaly among industrialized countries and is related to the fact that most formal vocational education institutions are accessed at the tertiary level. Comparative figures for the United Kingdom, Denmark, Germany, and Spain are 69%, 53%, 62%, and 37%, respectively. In spite of an ongoing emphasis on the importance of technical and vocational education, progress in that regard appears to be

limited in Ghana. In October 1997, the Ghanaian Ministry of Education established 20 vocational and technical resource centres throughout Ghana and stressed the importance of aligning syllabi with the needs and priorities of the country (Ministry to establish 20 vocational, technical centres, 1997). However, given the professed level of importance of this sector, the enrolment figure of 6% is low.

The gender difference with respect to gross enrolment ratios at all education levels is not considerable: Enrolment for male students was 48% and for female students 43% (for both Canada and Cuba, the figures for female students were slightly higher than for male students). In spite of being formally enrolled in the education system, however, women are apparently not reaching the same levels of literacy as men. Finally, a look at female enrolment ratios at all three education levels reveals that female students are still underrepresented at both the primary and secondary levels in Ghana (roughly 15% - 20% lower enrolment than male students), and are severely underrepresented at the tertiary level where they constitute only 46% of male enrolments. In both Canada and Ghana, female enrolment at all education levels is equal with or higher than male enrolment, and female overrepresentation is highest at the tertiary level. This last set of statistics clearly shows that there are still formidable barriers in place in Ghana to female participation at higher levels of education.

These data serve to illustrate that Cuba, in many ways, is approaching indicators of human development more commonly observed in the industrialized countries of the world, whereas Ghana still finds itself towards the bottom of the group of countries classified as medium human development, amongst the lowest quartile on the index. The figures in Tables 5-10 provide some indication that Ghana still has a long way to go in

regard to building an effective education system that supports the country's human, social and economic development.

Given the limitations of this study, I am clearly not suggesting that the Isle of Youth program would have been in a position to exert any influence over the indicators presented in the Table. However, I think it is useful and practical to assess, in particular, the lessons missed from the program – as perceived by the study participants and interpreted by me as the researcher - in the context of these indicators. All lessons learned and lessons missed as discussed in this section are based on the experiences of those graduates and former administrators who participated in this research. The study does not and cannot aspire to present broader findings at a program level since the intent of this study was not to undertake a formal program-wide evaluation. As I elaborate further in the section on recommendations for future research in chapter 5, my analysis is meant to stimulate interest in further exploring the potential lessons to be drawn from the broader program, and the reader is urged to approach the present and following sections in that spirit.

Lessons learned from the reported experiences with the program exist largely at the theoretical level since very few lessons appear to have been practically adopted and implemented after the program came to an end. The program managed to reach a pool of scholarship candidates that belonged to the less privileged segments of society by reaching out after the primary level at which point only a relatively small percentage of students had dropped out of school. This effect is corroborated by the statements of 12 out of 23 graduates who responded to a question in this regard, indicating that they would not have been able to get a tertiary education without the Isle of Youth program (see

Table 5). The study participants thus experienced the program as having at least in some measure achieved its goal to provide scholarships to academically deserving students, regardless of socio-economic or geographic background.

One of the few areas where changes occurred that may have at least partly been informed by lessons learned from the Isle of Youth program was the introduction of Junior Secondary Schools (JSS) and Senior Secondary Schools (SSS) in Ghana, to be modeled on the idea of closer integration of academic and practical subjects.

What appeared to be anything close was the emergence of the Junior Secondary School structure which we developed here with emphasis on technical rather than reading subjects. In the curriculum were subjects like pre-vocational and pre-technical skills. ... This resembled what in the Cuban system was called labour education – educación laboral – in which students learned carpentry, electrical wiring, some masonry, fine art, etc. (Nsoah, administrator)

The JSS system was implemented in Ghana in 1987 (Berry, 1994), and although some of the concepts integral to the Isle of Youth program might have informed the JSS and SSS curricula, it was suggested to me by a number of interviewees that full implementation has not followed suit to date.

At the individual level, many of the graduates I interviewed commented that they had obtained a good understanding of what being “humane” means. They even developed philosophies on running a society on ethical rather than political principles. One graduate elaborated on the skills Esbecans had gained with regard to a broader outlook on life and learning from the interaction with other peoples:

And then the advantage we have over our colleagues back at home is – we can speak two languages, we have been outside, so we can compare the outside world to the inside world. We can think outside Ghana, we have been around foreigners from different countries ... you can compare things because you understand. ... Okay, and these people solve their problem this way, so let's look for other alternatives for solving this problem. (Kweku)

Many graduates who spoke with me also gained an appreciation for the organization of education around utilitarian principles, rather than the classical (Western) principles of liberal education. "Cuba has a way of regulating. ... In terms of education being more closely related to the professions that are needed" (Serwa, graduate). Several graduates commented on the importance of adopting such a utilitarian approach in Ghanaian society in light of the country's state of development.

Entrepreneurism is an area that was identified by several graduates as a missing element in their Cuban education. It was also suggested by a few administrators that entrepreneurship was not encouraged in Ghana until recently, either. However, one administrator reported that the government is now encouraging such programs, and that the University of Ghana is in the process of introducing a mandatory course on entrepreneurship. A few respondents mentioned the lack of entrepreneurial programs and courses available in Cuba, which contributed to the returning graduates' heavy reliance on the state in their search for professional integration.

After the initial problems encountered by the Cuban-trained graduates with regard to their acceptance in the job market, they feel that their work attitude is now slowly being recognized. One engineering graduate actually traveled with his supervisor to Cuba

to recruit Cubans for a limited period of time so they could share with the Ghanaians some aspects of Cuban working styles and culture.

One fundamental lesson missed is related to the short time period during which the program was operational, potentially resulting in a much reduced impact to what might have been possible had the program continued for a longer period of time in a format that could have continuously been modified and optimized. As McMahon (1999) found, rates of investment in higher education only show positive economic effects in the long run, and too rapid a sectoral expansion can be counterproductive if graduates face a shortage of jobs and leave. This problem appears to have affected the Isle of Youth program: the interviewees' accounts suggest that the training of a significant number of students in a relatively short period of time was not accompanied by the building up of tertiary infrastructure in Ghana itself, in particular with respect to the expansion of the technical/vocational sector and proper accreditation and transfer arrangements between that sector and universities. As reported by the graduates and administrators, the situation was further exacerbated by the absence of a job market in some professions which were at the core of the program.

It further appears that little or no attempt was made to incorporate components of the Cuban education system back in Ghana:

We did not consciously or deliberately adopt or adapt the program structurally for our national needs, although many of those involved, including myself, saw the need to develop something similar to the Cuban model here in Ghana - of course with Cuban assistance. (Nsoah, administrator)

Asked about what he would do if provided with funds to make changes to the education system in Ghana, based on what was learned from the Isle of Youth program, the same respondent replied:

I would start a work and study program in some of the remote areas of the country. ... If each group of [inaudible] in this country today had gone through that kind of program, work attitude would have changed, discipline would have changed, everything would be different. (Nsoah)

This was closely echoed by a graduate:

I would do exactly the system I went through, here. At least a pilot, because I still think it's a much better opportunity than what we have. ... I would like to have an environment where using the work and study program – I would see how people would sustain their own education. So they can think of other things rather than struggling to pay school fees. (Mawuli)

This engineering graduate mentioned further improvements for postsecondary education in Ghana that he would like to see, based on his Cuban experience. In particular, he noted (1) more frequent evaluation of instructors and of the curriculum (due to perceived low output in Ghanaian engineering schools), (2) more time spent in school and fewer holidays, and (3) more access to resources such as training materials, books, computers, labs.

The underrepresentation of female students in Ghana's education system, as presented in Table 9, further emphasizes the importance of structuring programs around access for females to achieve equal gender representation. From the reported experiences with and practices adopted by the Isle of Youth program, it can be gathered that the

program likely made no contribution in this regard. Rather than acting as an equalizer, participation rates for female students were actually worse than back home in Ghana. The program does not appear to have attempted to solve the challenges it encountered with respect to participation of both sexes, but dealt with the issues that arose by banning female students from the program after 1986. The challenge of teenage pregnancies was labelled as a “problem” associated with the participation of girls in the program, thus negating the role played by the male students in creating the pregnancies. Given the widely acknowledged role of women in the development process, this is an unfortunate aspect of the participants’ testimonies regarding the program.

One of the most disturbing aspects of the public expenditure data in Table 7 is the fact that the largest proportion of the reported public expenditures for Ghana went to debt servicing – about twice the figure for education spending. This figure suggests that the structural adjustment programs first adopted in Ghana in the mid-1980s had long-term negative effects. Any interest payable to international lenders carries an opportunity cost in terms of money unavailable for building endogenous Ghanaian capacity in the education sector. Any correlation between limitations on public education spending imposed by structural adjustment conditionalities, and the financial constraints on the Isle of Youth program as evidenced, for example, by the inability to provide more than a handful of students with visits home during their extended stay in Cuba, is beyond the scope of this study. Future formal evaluations of the Isle of Youth program should pay attention to the circumstances that determined the program’s budgetary framework.

Kallaway (2001) argued that the early post-independence emphasis on rural vocational and agricultural education had not materialized during later years in many

African countries. This statement is borne out by the statistics on enrolment in technical and vocational programs at the upper secondary level, as presented in Table 9. These data suggest that the introduction of JSS and SSS has not yielded the desired results, as evidenced by Ghana's meagre 6% enrolment in such programs. Since rural vocational and agricultural education were key to the Isle of Youth program, a formal program evaluation could assess the potential of these components for adoption by Ghana.

The Isle of Youth program was built around the integration of secondary and postsecondary studies. As I pointed out earlier, this aspect has particular importance with regard to increasing the pool of academically deserving, prospective scholarship candidates before they drop out of the school system. McMahon (1999) also emphasized the importance of investing – for achieving growth in the short term - in secondary education once universal primary education is close to being achieved in a nation. Ghana's secondary enrolment rate of 36% in 2002/03 is low and is likely linked to the exaggerated emphasis on primary/basic education by the international donor community and thus, by extension, enshrined in the conditionalities imposed under the SAPs during the two decades preceding the new millennium.

In discussing potential lessons missed from the Isle of Youth program, it is useful to also consider the formulations of Carnoy and Werthein (1983) who provided a critical class-based analysis of the applicability and transferability to other lower-income, yet not necessarily socialist countries, of such Cuban concepts as rural boarding schools and the work and study program. The authors saw no problem with such transfer in principle, arguing that rural boarding schools were already common in rural East Africa. However, Carnoy and Werthein cautioned that countries run by an urban bourgeoisie would be

unlikely to dedicate significant resources for the development of a skilled rural labour force because the primary concern of the urban bourgeoisie is the development of skilled labour for use in urban manufacturing and services. The authors further surmised that in capitalist societies where no attempt was made at equalizing the status of urban and rural populations, higher wage incentives in urban areas would also work against getting the educated segment of the population to stay in or move to rural areas for work once they qualified for positions in the urban job market.

Carnoy and Werthein (1983) had similar concerns regarding the work and study program: The urban elites in a dependent capitalist society would likely be reluctant to see their children working manually during secondary school or university. They pointed out that study and work frequently do occur simultaneously in capitalist societies, but mainly for students to support themselves throughout their studies.

Carnoy and Werthein (1983) thus concluded that

While such educational reforms can perhaps be transferred to nonsocialist societies, in practice this transference is not likely to take place – not because of the malevolence of the parties involved, but because such transfer conflicts with the self-interest of dominant groups in a class-structured capitalist society. (p. 240)

In the final analysis, Carnoy and Werthein saw the problem of education in the Majority World as a political, not a technical issue, which could not be resolved until those in power were willing to redistribute the education budget and curtail the disproportionate access of the elite's children to the highest levels of education.

There is some support for Carnoy and Werthein's (1983) thesis in the Ghanaian situation: In late 1984, the National Union of Ghana Students (NUGS) argued against a

proposal for a work and study scheme that aimed to ease the burden on the education system. The students' left wing "suggested that the obvious reluctance of the student leadership to accept student participation in production while at the same time advocating farming for workers reflected an elitist outlook characteristic of products of the existing educational system" (Asante, 1984, p. 2260). The students on the left alluded to a situation where a large number of university students were children of the Ghanaian political and economic elite who were disinclined to become involved in agricultural activities for the benefit of society at large.

Richmond (1990a) qualified Carnoy and Werthein's (1983) analysis by adding that the transfer of Cuban educational reforms to other settings would have to be accompanied by the respective ideological and socio-economic changes in capitalist developing countries for the reforms to be able to take root. However, he also noted that those other developing countries needed to be differentiated with respect to their receptivity to the Cuban model according to their particular socio-political context. Carnoy and Werthein's argument is corroborated by Eckstein (1985) who cautioned that capitalist countries in the lower-income part of the world have a short-run orientation towards economic gains and would therefore not be inclined to invest scarce resources on the scale of Cuba into long-term human capacity building initiatives. The study participants' accounts suggest that the program suffered from the lack of a longer-term perspective. While this is a common phenomenon in education where reforms often cannot be fully sustained beyond the political cycle of a government's time in office, this situation is surprising in the context of the Isle of Youth program, given that Rawlings remained in power for 20 years, albeit with different administrations. One graduate noted that "If I'm drawing a

program to train people for – do capacity building, I have to have a plan to use the capacity that I'm building” (Mawuli).

Carnoy and Werthein (1983) recommended the school-in-the-countryside model for other primarily agricultural countries in the Majority World, pointing to three benefits of this scheme: (1) ability of schools to become self-financing and sustainable, (2) reduction of urban-rural inequalities, and (3) using urban students to help address labour shortages in rural areas. This perception is echoed by one of the interviewed teachers who argued for farm-based schools in the countryside: “Ghana is an agric country, and all that stretch of land, what are we doing with it? I remember some days, we used to have school farms” (Tawiah). It can be surmised that adoption of elements of the Cuban model into Ghanaian society might have been easier had the country continued on the path initially taken by the first Rawlings regime. However, this does not mean that a more free-market oriented government would not have been able to also see some benefits for the country's development in different aspects of the program. The insights gained from this study allow some speculation as to why Ghana seems not to have adopted elements of the Cuban model into its education system at home. Political changes and an increasing orientation towards Western models appear to have played a major role in this regard.

Although the program may not have had the impact that it could potentially have achieved if it had been sustained over a longer period of time, and if transfers into the local Ghanaian education system would have been implemented, graduates individually and as a group nevertheless benefited in several ways. One important aspect is the tight network formed by them: “There's one language that we commonly understand that means 'solidarity' “ (Etse, graduate); “That's it. It's a bond, it's a big bond” (Abeeku,

graduate). There was evidence in the study that this bond translates into groups of graduates working hand-in-hand, in particular in the context of hospitals in Accra. I encountered this phenomenon in two instances where a number of graduates were working together to improve service delivery in the health care sector. Other graduates referred, in particular, to the relationships built not only between Ghanaians, but also between students from different African nations: “It has opened us to the world. Us and the people from other countries, we have created something, we built a universe on the Isle of Youth” (Atakuma, graduate).

### **Brain Drain and Brain Circulation**

Ghana has a long history of outmigration: Between 1974 and 1981, an estimated two million Ghanaians emigrated, mostly to neighbouring countries. A large number of these migrants, between 900,000 and 1.2 million, returned when Nigeria expelled foreign citizens in 1983 (Anarfi, Kwankye, Ababio, & Tiemoko, 2003). More recently, emigration has been characterized by diasporization as people move to major cities in the Minority World: Between 1986 and 2001, for example, 49,703 Ghanaians moved to the USA, and between 1975 and 1981, Ghana lost about 14,000 qualified teachers (Anarfi, Kwankye, Ababio, & Tiemoko).

Anarfi, Kwankye, Ababio, and Tiemoko (2003) outlined that a person’s sex is an important determinant in any migration decision. Norms and traditions of large parts of Ghanaian society favour men, and it is feasible to assume that women in general would be less inclined to move (Anarfi, Kwankye, Ababio, & Tiemoko). Surveys of migrants from Ghana to other African states and to the developed world show indeed that international migration is dominated by men. However, it is difficult to accurately assess

the incidence of migration because migration is frequently temporary, and return migration occurs in substantial numbers (Anarfi, Kwankye, Ababio, & Tiemoko). This study lent further evidence to the claim that migration is more prevalent amongst men than women. I spoke with only one woman who left Ghana, and she did so because of her husband's relocation to the North for academic purposes. The other women I interviewed, when asked about whether it had occurred to them to move elsewhere, mostly indicated that this was not an option for them.

I didn't want to come back anyway. I didn't want to come back but it was like I didn't have a choice. ... For a woman, it would be very difficult for you just to live and go to another man's country without knowing where you are going. But the guys, you know, it is easy for them to do that. (Beduwa, graduate)

Another female graduate indicated that

After spending 10 years out, I also wanted to do at least 10 years at home before I would consider moving out. ... After leaving my parents for those years I want to be with them. No matter what, I want to spend some years at home. ... As for going out again, I am not that type for staying so long outside. So it never occurred to me. (Mensuwaa)

The experiences of those who emigrate, as reported in the literature, are mixed. Ghanaians who emigrated to the U.K. reported how difficult it was for them to find qualified work in their area of expertise. For some, it was worth the move because access to qualified jobs in Ghana was perceived to be blocked by corruption and nepotism, whereas others had very successful early careers in their field (Akwagyiram, 2007).

Several emigrants in business-related fields reported their desire to return to Ghana after a few years and set up their own business at home (Akwagyiram).

The emigration experience reported in the literature was confirmed by those study participants who moved to the Bahamas. At the time when I undertook the interviews in Nassau, the local organizer estimated that between 30 and 40 graduates of the Isle of Youth program were living in the Bahamas. I gathered from the interviews with the Bahamas-based graduates that four main reasons account for their concentration in a relatively small country: (1) Several early graduates moved to the Bahamas and invited others to come, assisting them with settlement upon arrival; (2) Settling in the Bahamas was relatively uncomplicated for Ghanaians due to existing immigration regulations between Ghana and the Bahamas; (3) Ghanaians had made regular trips to the Bahamas while studying in Cuba to visit the families of friends who studied with them at Cuban universities; and (4) The Bahamas are geographically very close to Cuba which made the move viable from a financial perspective. The geographical proximity was particularly attractive for those graduates who had started a family while in Cuba.

Although almost every one of the graduates residing in the Bahamas was gainfully employed, few worked in their area of expertise. Several graduates in Nassau spoke of their desire to go home to Ghana, but felt that this goal was getting increasingly more distant as they were settling in the Bahamas with family obligations. One respondent who now lives and works in Accra went to the Bahamas after graduating, but found out he could not practice as a veterinarian. Instead of continuing on with jobs outside his field of expertise, he decided to return home to Ghana after seven months in the Bahamas. Another graduate tried his luck for several years in Southern Europe where he stayed

behind while in transit to Ghana from Cuba. He gained valuable insights into the situation of Ghanaian immigrants living in that part of the world, often in illegal and/or impoverished conditions. Eventually, he returned to Ghana when he realized that it would be very difficult to earn enough money to pay the tuition fees for a Master's degree in Europe, and that he might not be any worse off, or even better off, in his home country.

Global wage differentials are typically cited as a major driving force in the migration decision ("Fruit that falls far from the tree", 2005). However, wage differentials were rarely mentioned by the graduates who participated in this study. The more fundamental issue of obtaining employment related to their field of study took higher priority over the question of salaries. In the 1960s, Grubel and Scott had theorized that emigration should be welcomed if the emigrant improved her or his income through such a move provided the migrant's departure did not reduce the income of those remaining behind. Apart from the difficulties associated with evaluating the second condition (as discussed in chapter 2), this theory also fails to take into account situations where study abroad students never return to their home country. In the case of the Bahamas-based graduates, for example, who went there straight from Cuba, it would be difficult to ascertain what their income level would have been had they returned, and thus to calculate the income differential based on purchasing power parity.

The neoliberal economic argument advanced by Stark (2004) that the potential for outmigration would entice the source country to invest in human capital formation, was not borne out at the micro-level of this study. The ESBEC.COM website contained 296 registered members with location information in early August 2008. Of the registered members, 151 or just over 50% of the registrants reported a place of residence in Ghana,

while 145 or just under 50% of the registrants reported living outside of Ghana. The number of registered members constitutes approximately 25% of all graduates and is thus a fairly large, albeit not necessarily representative, sample of the total population. The considerable number of Esbecans residing outside Ghana indicates that the potential for outmigration existed. The absence of a study examining the reasons why such outmigration occurred, and the apparent lack of measures to counter outmigration by these graduates, suggests that Ghana may not have acted on the existing potential for outmigration. Future research is critical to determine the accuracy of this hypothesis.

Neoliberal economic reasoning tends to assume rational decision-making and the absence of non-rational impinging factors. The present study is a reminder that this line of reasoning is frequently not realistic. Along the same vein, Stark and other neoliberal economic theorists (Beine, Docquier & Rapoport, 2001; Mountford, 1997; Vidal, 1998) postulated that higher potential salaries in another country will provide an incentive for lower-income countries to invest in human capital. This is essentially the same argument as Stark's if the assumption is that it is largely those higher salaries abroad which cause outmigration. Again, the present study does not provide any evidence to support this theory.

One of the important features of the Cuban scholarship program is its lack of the main pull factor often associated with study abroad: providing the opportunity to act on a push-induced desire among the students to not return home (Okome, 2005). Cuba does not have a legislative framework that permits graduates to stay in the country, nor does it provide any prospective salary incentives. However, Ghana appears to have created its own push factors: As one interviewee noted, "[the graduates] came with a lot of

commitment, and loads of, bundles of commitment and loyalty, and dedication to work without any salary.... The only thing that affected them was the disease of non-recognition. And that's what came from the political leadership" (Razak, administrator).

As the study by Pires, Kassimir, and Brhane (1999) showed, training outside Africa at the PhD level (in that case in the U.S.A.) resulted in a large percentage of non-return. In light of this finding, although likely motivated by other considerations, the decision of the Ghanaian government to ask graduates to return to Ghana before pursuing any advanced-level studies in Cuba probably reduced the incidence of instant brain drain. In general, the design of the Cuban scholarship program poses a challenge to the literature on study abroad-induced brain drain since the literature shows that outmigration largely occurs to the country of study. This is, of course, not possible in the case of study abroad in Cuba. However, the study suggests that outmigration may still result to third countries following a study abroad sojourn.

In the context of mobility of health care professionals, Jacky Kaba (2004) pointed to the potential role that migrants can play in the development of their home country. He noted that mobility can generate remittances, help promote exchange of knowledge among professionals, and help upgrade skills and standards in the poorer country. Keeping in mind the study's limitations of scope, there is little evidence for this claim coming from this study. Only one graduate mentioned remittances in particular. This is surprising since the estimated remittances of Ghanaians in the diaspora are substantial and have been estimated at over \$2.5 billion for 2003 (Adepoju, 2005). However, only 12 graduates of the 48 who participated in this study lived outside Ghana, with 10 of them living in the Bahamas, not a traditional high-income developed country. It can be

expected that including more graduates residing in high-income countries would have yielded more references to remittance payments. None of the graduates made any mention of exchanging knowledge with colleagues in Ghana or helping them upgrade skills and standards from outside the country. Although collaboration of this nature might happen, it was not something that the graduates mentioned. In this regard, existing Ghanaian diaspora associations are of interest: Such associations have become known for playing a role in the social, economic and political development of their home country (Adepoju; Manuh & Asante, 2005). In some cases, the Ghanaian diaspora has made contributions to development through localized community-level projects. In his study, Akologo (2005) found, however, that such projects are frequently random and uncoordinated, thus raising questions about the projects' sustainability and contribution to sustained development. Although the graduates' affiliation through the ESBEC.COM website does not appear to have quite achieved the status of such a diasporic attachment, it might in the future develop into serving a similar purpose.

The single most important factor in the graduates' decision to return to or stay in Ghana, as reported by the participants, was the recognition or lack thereof they received in their home country, or the perception they formed through communication with their peers in that regard. Upon return, they experienced most of the push factors identified by the IOM (2003) as playing an important role in the migration decision:

- unemployment, increasing the dependency burden on their families;
- rigid government employment systems;
- professional isolation;
- discrimination in appointment and personnel policies;

- employer discrimination against qualifications held (bias against degree obtained in socialist country).

This study of a sample of graduates from the Isle of Youth program backs the claim made by Samoff and Carrol (2003) according to whom regulations forcing students from lower-income countries to return home after studying overseas had been unsuccessful. Even strict enforcement of such regulations, as was the case in Cuba, did not prevent the students from leaving Ghana later, or from moving to a third country directly from Cuba. It could be argued, though, that even more students might have decided not to return to Ghana if there had been an enabling environment for such a decision.

Most graduates in the Bahamas were still contemplating a return to Ghana. “Every one of us would like to go home” (Akwesi, graduate). Some of those who went home did so in spite of the negative reports with which they had been confronted as students in Cuba. For them, the pull of going home, seeing their families again and being in a familiar environment, was more important than the materially better life they might find elsewhere. As one graduate put it, “no amount of money can satisfy the soul” (Fenuku). Graduates commented on how their long absence from Ghana had impacted the return decision: “One of the collateral effects is there is some lost sense of identity” (Etse, graduate). “So that brings a fear for people to go back home” (Gyasi, graduate). It is conceivable that a percentage of the graduates who left Ghana or who never returned after leaving Cuba could have been kept in the country or attracted back to Ghana if a more enabling environment had been created for them. The assessment of one teacher that “most of them were looking for opportunities to go to other places, other countries, where they thought that things were quite rosy” (Tawiah) does not quite ring true, at least

not initially. Graduates longed to go home to their country and their families after the long stay in Cuba. It was not as easy to go to other countries directly from Cuba as it was to the Bahamas, so those graduates present an anomaly in terms of their migration pattern. Several graduates indicated that their peers who are now in other parts of the world, in particular in industrialized countries, first returned to Ghana. As one graduate observed, “There was less selfishness among the people who came down [to Ghana]. So most left simply because they didn’t have place to work or anything, just to deliver. And I find that disappointing, quite disappointing” (Mawuli).

## **Chapter 5 – Conclusions, Implications and Recommendations**

### **Interpretation of Findings in Light of Research Questions**

In his 2001 book *Globalization and postmodern politics: From Zapatistas to high-tech robber barons*, Burbach argued against the viability of enunciated and deterministic paradigms of whatever political spectrum to solve the problems of contemporary society. Burbach cited Gibson-Graham's (1996) criticism of capitalism and the economic discourse, that because "most economic discourse is 'capitalocentric,' ... other forms of economy (not to mention noneconomic aspects of social life) are often understood primarily with reference to capitalism" (Burbach, 2001, p. 83). The study participants' accounts and reported experiences appear to indicate that the two major political paradigms – capitalist and socialist – bear heavily upon their experience with the Isle of Youth program, in particular in relation to their post-program challenges. Overall, the interviewees' reports suggest that the perception others had of the graduates was linked to the political discourse of the day in Ghana, and to notions of the superiority of Western-style education. Based on the observations of the study participants, there was little evidence that the concept of the Isle of Youth program was critically assessed, and that those elements which the interviewees regarded as useful were developed and built upon to solve educational challenges in Ghana.

In Chapter 1, I formulated seven questions that guided this research. I will now provide responses to these questions based on the findings of the study.

#### **Question 1**

How significant and relevant do the Ghanaian graduates, interviewed for this study, perceive their Cuban education to be in the Ghanaian context, considering the geographic

distance and socio-economic, linguistic, political and cultural differences between the two countries?

The political differences between Cuba as a socialist/communist country, and Ghana's capitalist orientation, have caused some confusion for the graduates in this study. Several participants elaborated on how the altruistic, humanistic orientation instilled in them in Cuba is not practical to the same extent in the context of the market-oriented Ghanaian society. Fusion of academic and manual work is not seen as common in Ghana as it was in Cuba, a situation that graduates and administrators alike hold responsible for a perceived initial lack of understanding by employers regarding the benefits of the applied skills acquired by the graduates. Furthermore, the graduates' observations in Cuba with regard to the state's caretaker role unrealistically influenced their perceptions of what to expect in Ghana upon return in terms of job availability.

Most graduates interviewed for this study regarded the social standards in Cuba in terms of health care, education and general social infrastructure as being higher than in Ghana. This assessment depended to some extent on the graduates' background: Those from structurally poorer, more remote regions in Ghana tended to perceive economic standards in Cuba as higher, while those from urban centres were used to equal or higher economic standards in their home country environment. At the time the graduates were in Cuba, that country was characterized by the absence of a money economy (this has changed recently due to the arrival of tourism on a large scale). However, the graduates received stipends from the Ghanaian Embassy during their postsecondary studies, thus never completely losing touch with the practices associated with economizing and financial management. The majority of graduates perceived the professional

infrastructure in most Ghanaian jobs as weaker than what they encountered in Cuba, requiring them to adjust upon return to a lower technology environment. On the other hand, the graduates felt that the Cuban academic and professional infrastructure that they encountered during their postsecondary studies and related practical work were sufficiently advanced to allow for upward adjustment to levels typically prevailing in the highly industrialized countries of the world.

The former students reported that linguistic differences between Ghana and Cuba had provided them with an advantage. Several graduates indicated that learning a new language tends to broaden a person's mental horizon. Also, some of the Bahamas-based graduates have been able to put their Spanish language skills to use in their work. Although a few graduates encountered some initial linguistic challenges upon return to Ghana, none of them reported that this had proven to be problematic over time since they have apparently all quickly been able to adapt back to English as the formal professional language.

Cultural differences between Ghana and Cuba were reported to have caused the graduates problems upon re-integration, and it appears that some of these challenges linger on. Years after their return, many graduates are still aware of this culture clash in different spheres of life, in particular regarding interactions within their families and in the work place. Cultures are deeply engrained structures that shape a person's behaviour and ways of thinking. Given the graduates' extended stay in Cuba, they have retained some features of the Cuban culture. However, this situation has not prevented the Ghana-based graduates who were interviewed from being active members of Ghanaian society and participants in the country's workforce. It appears that the graduates handle any

continuing cultural disconnect by identifying with and practicing aspects of two cultures side by side. They stated that, in the workplace and within their families, they had relearned and (at least partly) reverted to Ghanaian cultural norms. Outside these settings, and in particular in interactions with their fellow graduates from the Isle of Youth program, the graduates maintained cultural forms of expression acquired in Cuba.

Overall, the technical and professional aspects of the graduates' Cuban education appear to have been relevant to the Ghanaian context. The graduates who spoke with me reported being well prepared to fit easily into middle-level and higher-level professional positions. With regard to the broader social context in which their Cuban education took place, the graduates reported certain challenges. The Ghanaian program organizers tried to keep students connected to the Ghanaian socio-cultural context during the years on the Isle of Youth in secondary school. However, once the students went on to pre-university school or a polytechnical school, they had little or no more exposure to Ghanaian teachers, Ghana-focused curricula, and Ghanaian "role models" who demonstrated cultural behaviour that was accepted in Ghana. This situation was even more severe once the students moved on to university. The Cuban experience was described by administrators and graduates as having been considerably different from the graduates' home environment, which led to feelings of alienation and disorientation upon return. This effect is not surprising in light of the graduates' long absence from Ghana. It is also not any different from what any person who migrates to another country for an extended period of time and then returns home, is going to experience. Nevertheless, the cultural perceptions and patterns of behaviour with which the graduates returned after their lengthy absence from Ghana were seen by graduates and administrators as a challenging

“byproduct” of their Cuban education since they impacted the returnees’ ability to reintegrate into their home society during the first few years.

### **Question 2**

To what extent do the Ghanaian graduates and former program administrators report seeing this program as successfully combining liberal and utilitarian principles of education?

The combination of liberal and utilitarian principles of education is most apparent at the secondary level. Commenting on the work and study program with the benefit of hindsight, the majority of graduates indicated that this aspect of the Isle of Youth program, and their location in a rural boarding school, had given them an appreciation for a holistic approach to education. Rather than displaying an elitist attitude, the graduates interviewed appeared to have learned to appreciate the realities of life in a communal setting where work was a collaborative effort. They also reported having learned early in life to be independent, resourceful and not to shy away from work. At the postsecondary level, the study participants provided examples of the close alignment of their curricula with Majority World contexts. In veterinary medicine, curricula focused on livestock and animals husbandry for consumption, rather than companion animals, as is the main focus in the Minority World. Automation engineering had a focus on automating manual processes and using technology in industrial operations, often with non high-tech equipment suitable to the environment encountered in large parts of Ghana. Some aspects of this educational canon were apparently unintended: The economic crisis in Cuba in the 1990s forced students to be resourceful in the presence of scarcity, a learning experience unlikely to be found to the same extent in the Minority World where the necessities of

life are available in abundance to most people. Many former students cited the close alignment between academic and practical training as a particular strength of their Cuban postsecondary program. Several graduates emphasized the Cuban system of centralized planning as a more effective approach of aligning education with the needs of society, compared to how they perceived this matter to be handled in Ghana.

The majority of study participants reported, directly or indirectly, that their Cuban education had offered a balance of liberal and utilitarian educational principles. Many graduates referred to a commitment to ethical principles for behaving as individuals, and provided perspectives on how political leaders should govern. At the same time, the participants felt that their Cuban education had prepared the graduates for work in diverse environments, urban or rural, directly or indirectly related to their field of expertise. A frequent comment made verbally and affirmed by the life and career trajectories of some graduates since graduation was that they can survive anywhere, that they are not afraid of anything, and, above all, are willing to work hard. One area, however, in which many graduates perceived a pronounced weakness with their Cuban experience, was the lack of socio-cultural and political education they received besides their technical training at the postsecondary level. Graduates indicated directly or implicitly how this aspect of their Cuban education manifested in a variety of ways, such as a lack of leadership skills, and an inability to negotiate effectively and confidently around employment issues. Ultimately, these inadequacies were seen to constitute a barrier, hindering the graduates from becoming more directly involved in the affairs of Ghana through political leadership and involvement in governance issues.

The perspectives of a considerable number of graduates in this study appeared to differ from the perspectives advanced by the administrators I interviewed. Administrators tended to see the program's objectives primarily in regard to the preparation of technical specialists in the respective fields of study, whereas many graduates expressed a need for developing a more general set of skills alongside the technical training, thus putting more emphasis on the liberal principles of education.

I have discussed earlier whether the Cuban socialist model of education could simply be regarded as an alternative modernist paradigm, rather than a model that may be more closely aligned with indigenous educational philosophies in Ghana or other postcolonial societies. Adeyemi and Adeyinka (2003) emphasized the utilitarian nature of African traditional education, arguing that postcolonial African societies should return to a modified version of this indigenous system where society plays an important role in preparing individuals for particular professions or occupations. This argument allows for further reflection on the earlier discussion about the Cuban socialist model of education. The points made by Adeyemi and Adeyinka suggest that the Cuban model could indeed be seen to be more closely aligned with traditional indigenous African models and might serve as a stepping stone towards a full indigenized education system.

### **Question 3**

What do the study participants believe to be the impact of combining secondary and postsecondary studies in this South-South educational assistance model? Do the participants feel that this model provided opportunities for students from diverse socio-economic backgrounds?

Based on the reports by study participants and the demographic data presented in chapter 3, as well as discussions of the data in chapters 3 and 4, I argue that the combination of secondary and postsecondary studies resulted in enhanced opportunities for students from different socio-economic backgrounds. The sample contained graduates who clearly indicated the limitations they would have faced attaining an education in Ghana equal to their Cuban education. This aspect of the graduates' experience with the Isle of Youth program must be considered in light of the high drop-out rates and attrition rates at early stages of schooling in Ghana, similar to the situation in many other parts of Sub-Saharan Africa. In this context, the existence of a strong bureaucratic and professional elite that demanded privileges in many spheres of life, including access to education for their children, also needs to be taken into account. The administrators' descriptions indicate that such demands made by privileged persons with political and/or military links to the government were frequently met during the first two or three years of the program with disproportionate numbers of program places going to the children of those elites. The evidence and the participants' reports suggest that after the first few years, students started having to write competitive tests at different selection levels (municipal, district, regional), although the implementation of these tests appears to have been uneven across the country, and might never have been fully accomplished in certain areas. In those later years, the program designers apparently appeased the elites by assigning 20 places annually to the children of the members of the bureaucratic bourgeoisie (police, military, government officials). Apart from the challenges created by high drop-out rates and attrition between different levels of education, the reported lack of available places in postsecondary institutions was also a factor that made the Cuban

scholarship program attractive. It permitted the training of approximately 1,200 Ghanaian students, many of whom would likely not have been able to receive a postsecondary education otherwise.

Due to its relatively short duration and based on the participants' accounts of challenges during the first years, the program recruitment procedures were possibly never fully optimized. The recruitment model used by the program designers, as recounted by the interviewees, was nevertheless equally impressive and logistically challenging since it involved extension activities into Ghana's rural areas and the mobilization of organized groups of parents through the POSICAs.

Recruitment and schooling at the secondary level also ensured that the students received an in-depth preparation for their postsecondary studies in a different cultural and linguistic environment. Graduates recounted that their command of the Spanish language and understanding of the cultural environment of Cuban society were excellent by the time they advanced to postsecondary studies. Encountering culture shock and linguistic challenges can otherwise be very disorienting for postsecondary study abroad students and tends to distract them from their academic work. The downside to early recruitment was the resulting long absence of the students from Ghana and from their families. The study participants' opinions on this aspect suggest that sponsored trips back to Ghana every two or three years would have to some extent alleviated the feelings of homesickness and cultural alienation resulting from the students' long sojourn away from home.

**Question 4**

To what extent do the graduates perceive a link between the kind of contribution they are making through their careers, and the emphasis on human development and altruism that they experienced through the Cuban educational philosophy?

Some graduates reported finding it more difficult to apply the broad ethical mindset that they had acquired in Cuba in a society like Ghana which they perceive to be more focused on materialism and the money economy. Several graduates are apparently involved in community work at local levels, like fundraising for needy children, organization of community labour – cleaning up areas and buildings, painting - and volunteering time in medical settings. Without minimizing the value of such work, it is probably fair to say that such activities have so far had a limited impact on larger development processes in Ghana. Some isolated cases of broader development contributions were reported during the interviews, like Mawuli's project with ECOWAS, or the intensive involvement of a human medicine graduate in setting up an ambulance service for Ghana. Most contributions to the development process have so far been made through committed service in the graduates' work environments. A few graduates are also starting to implement some broad and innovative ideas that are based on their studies in Cuba. One graduate of veterinary medicine, for example, reported having submitted a proposal to the Ministry of the Interior for setting up a dog unit in the Ghana Police Service to fight narcotics issues.

However, some graduates focused exclusively on the technical aspects of their work and refrained from commenting on larger development processes in Ghana. Others who emphasized the perceived high quality of their Cuban training, in particular those in the medical field, mentioned the training of co-workers on the job as a way of passing on

technical know-how they had gained in Cuba. In that way, they saw themselves as multipliers of knowledge that provided benefits to a much larger group of people than those who had been the recipients of the Cuban education.

Most graduates who participated in this study did not explicitly and verbally link their current endeavours to the Cuban educational philosophy. However, many graduates referred to the sense of patriotism they encountered in Cuba in the context of talking about development in Ghana. While patriotism sometimes has a negative connotation in the West due to its perceived links with extreme ideological nationalism, it became clear during the study that the graduates used the term patriotism to denote an ethical and altruistic position that places a nation in its collective sense first, and the individual or groups of individuals second.

The Isle of Youth program was operational for only a relatively short period of time. Seven years were likely a much too short timeframe to expect any major impacts with respect to macro processes in Ghana. Several graduates and administrators suggested that if the program had been continued with Cuban assistance on Ghanaian soil, especially in rural areas of the country, the program could have been put on a sustainable footing and taken to the next level, with Ghana developing more ownership of the program. This might ultimately have allowed the Ghanaians to mould the program in a way that would have enabled it to support systematic indigenous development in Ghana.

#### **Question 5**

In the view of the study participants, was the students' education in Cuba relevant to Ghana's development priorities? How do the interviewees perceive the graduates'

reintegration into Ghanaian society in relation to Ghana's societal institutions, employers, and Ghanaian society at large?

The study revealed a notable discrepancy between the administrators' and the graduates' understandings of Ghana's development priorities in the 1980s. There was consensus amongst the administrators that the most effective educational approach to Ghana's development priorities in the early 1980s was through training at the mid-level in scientific and technical professions. The administrators reported that these decisions were made at the highest governmental levels by people involved in the technical committee for the Isle of Youth program. Each year, representatives of that committee purportedly traveled to Cuba to negotiate the postsecondary placements for the Ghanaian students based on Ghana's evolving priorities. Ghana consequently negotiated for the majority of postsecondary placements to be in the vocational/technical sector in Cuba's polytechnical institutions, rather than at the university level.

The majority of graduates in this study had a different perspective on the study programs negotiated for them by the Ghanaian authorities. They felt that most placements should have occurred at the university level, in particular in the health sector for human medicine and medical specializations, as well as for nurses. This logic stemmed from the difficulties encountered by many polytechnical graduates in their search for employment related to their training, and the perceived absence of suitable jobs. The main argument of those graduates was that positions in these sectors should have been available in Ghana if these areas had indeed been priorities for development. Some graduates pointed out that certain study programs, in particular some engineering specializations, exceeded Ghana's capacity to absorb these graduates.

Although the logic applied by the graduates is understandable, it appears from the participants' accounts that developments in Ghana during the 1980s and 1990s did not follow this logic. Although I assume that Ghana indeed lacked professionals trained at the mid-level in technical and vocational careers, as indicated by the administrators I interviewed, my research does not provide any evidence that Ghana created a roster of corresponding educational qualifications while the students were training in Cuba. This appears to be the reason why Ghana's societal institutions, government departments and employers were not ready to absorb graduates with various credentials upon their return, as confirmed by the majority of graduates and administrators whom I interviewed. Graduates reported that they encountered a range of problems upon their return to Ghana and also in the Bahamas: difficulties finding acceptance by employers and integrating into work environments; academic accreditation issues in Ghana if they wanted to further their education, and professional accreditation issues in the Bahamas; as well as discrimination due to their education in an Eastern Bloc country. The ground had apparently not been prepared in society at large to understand how the graduates' polytechnical credentials related to the Ghanaian context. Many graduates argued that only those in professions that were well established and understood, such as human and veterinary medicine, were more or less immediately absorbed into the economy. In this context, administrators and the majority of graduates alike considered contemporary Ghanaian views on credentials as a major barrier to a smoother re-integration into Ghanaian society. Several graduates and administrators made explicit or implicit reference to colonial intellectualism which was still seen to be entrenched in Ghana, as

evidenced by the respondents' indications that Western university degrees, preferably from institutions located in the U.K., are seen as the gold standard.

### **Question 6**

Were the participants aware of any government-initiated strategies to encourage the graduates to return to Ghana at the end of their program? How did the study participants perceive the nature and/or impact of these initiatives?

The study showed broad consensus among graduates and former administrators regarding the almost complete absence of any strategies to encourage graduates to return to Ghana or to discourage them from leaving again. The National Service Scheme is the only reported mechanism that may have served this role to some extent; however, it is not specifically targeted to those who studied in Cuba, but to all students after completion of their postsecondary education. The study participants agreed that the National Service requirement was not enforced and thus constituted little more than a moral obligation to return. Graduates and administrators indicated that finding employment for young graduates in Ghana is in many instances contingent on holding a National Service card which the graduates receive at the end of their one year of service. If students did not return to Ghana to do their National Service after graduating from Cuba, a long absence from their home country could thus potentially have served as an additional deterrent to returning since they may have experienced difficulties finding employment without a National Service card. Based on the participants' accounts and the National Service Scheme's vision and objectives, it appears that the Scheme could have operated as a forceful incentive for the return and integration of graduates, but that its potential was not fully utilized in the case of the returnees.

In light of the above, it appears that the return ticket which the Ghanaian government provided for all graduating students was the only “strategy” to bring the graduates back home to Ghana. Several graduates indicated that it was easy enough for them to go to a different place instead once their passport was returned, in particular if they remained in the Caribbean region. A few graduates reported that they were offered scholarships to continue studying in Cuba at the master’s level, but that the Ghanaian Embassy required them to first return to Ghana before pursuing any further studies in Cuba. This strategy may have also served as an attempt to ensure the return of all graduates after completion of their first credential. Because of their extended absence from their home country, the Ghanaian graduates much more resembled a diasporic population than a typical study abroad population. In that regard, it can be conjectured that they were in need of a particularly conducive return environment in order to optimize their reintegration into Ghanaian society and to facilitate the effective use of the skills that they had acquired abroad. The graduates from this study felt that the lack of overt reintegration strategies pushed them straight from their diasporic existence in Cuba into the diaspora of Ghanaians based in the Bahamas or elsewhere.

**Question 7**

Does the study raise any other issues with regard to educational scholarships between the countries of the Global South?

As mentioned earlier, many countries in the industrialized world count scholarships to students from the Majority World amongst their overseas development assistance. Typically, these students are recruited into bachelor’s or master’s level programs, after obtaining a high school diploma or first degree. This effectively eliminates most students

from deprived backgrounds who tend to drop out of school due to economic circumstances without finishing grade 12. This correlation between a student's socio-economic background and educational attainment is often ignored in North-South educational relationships, with a few notable exceptions, for example the United World Colleges. Lester B. Pearson United World College of the Pacific in Canada, for example, provides 200 full scholarships per year for a two-year pre-university program (Pearson College, n.d.). More often, however, students recruited from the Global South to study in Western countries are the children of elites. It must be noted that this issue is not restricted to North-South relationships: within Northern countries, there are also students who do not complete grade 12 due to socio-economic circumstances. However, the incidence of grade 12 completion is much higher in industrialized countries than it is in many Majority World countries like Ghana.

This study suggests that the provision of scholarships at lower levels of education might offer some solutions to unequal access at the postsecondary level. The study by Manuh, Gariba, and Budu (2007) quoted in the section on Student Recruitment – Benefiting the Poor? in chapter 4 clearly revealed that in 2002, students' Region of residence was still a major determinant for access to Ghana's universities. The Isle of Youth program attempted to address the issue of access equity by developing a scheme for recruiting students at a younger age and across all of Ghana's 10 Regions, thus trying to minimize the selective aspect of the students' socio-economic backgrounds.

The study also suggests that educational scholarship programs between countries of the Global South ought to adopt a long-term planning horizon and should include strategies to put such programs on sustainable footing over time. The short-lived nature

of the Isle of Youth program and its logistical complexity indicate that medium- to long-term sustainability was not built into the program design. The proposition by administrators and graduates alike that the program might have become more viable over time if it had been repatriated to Ghanaian soil, point in that direction. Building capacity in Ghana through establishing schools in rural areas based on the work and study model with the support of Cuba, as well as vastly expanding the polytechnical sector, might have aligned the educational system further with the country's needs in a sustainable and targeted manner.

Lastly, the need to recognize and support returning scholarship recipients cannot be emphasized enough. Again, this is a wider problem which also pertains to North-South scholarships. The recent annual survey 2008 report by the Government of Canada Scholars' Alumni Association which encompasses six different scholarship schemes concluded that

there was much discussion surrounding the reintegration to the home country following the scholarship period in Canada. It was suggested that attention be paid to the frustration and difficulty felt by many scholars due to limited employment and professional development opportunities in their home country. (p. 7)

Herein lies some potential for South-South educational scholarships: minimizing the frustration encountered by returning graduates through incorporating a re-entry or post-scholarship component into any scholarship programming is likely to mitigate against the strong push factors that may cause brain drain from the returnees' home country.

## Reflections on Research Methods

As outlined in chapter 2, this research presented me with a number of challenges. Building on what I outlined in chapter 2, I am sharing below some critical reflections on the methods that I used. My intent is to provide some advice for others who contemplate using similar tools and techniques in their research endeavour.

The research provided me with an unprecedented learning opportunity regarding research ethics and the question of how to gain participants' trust. Satisfying the human research ethics protocol is frequently portrayed as a clinical and purely administrative process in the literature on research methods. This is most likely inaccurate in any research setting; however, it is certainly far from reflective of the reality in international research that spans geographical, socio-economic, ethnic, and cultural divisions. Consent forms required by research ethics offices can be hostile documents in the eyes of vulnerable participants. Upon reading the form carefully and having experienced some reactions from participants, I understood that the text which was to assure participants that it was safe to talk to me frequently had the opposite effect: It made them more nervous. I learned that the best way to ensure that the interviews could proceed in an atmosphere of trust was to provide very extensive background information on my research through a conversation with the participant(s) before the data recording started. Anybody conducting this type of research should take precautions to add time for an expanded introduction to the allotted time for the actual interview.

Anything I was able to do to reduce the distance between myself as researcher and the participants helped in creating an atmosphere of trust. The more I was perceived as "the other", the less open participants tended to be. The more similarities with participants I displayed, the more comfortable they were. I am reasonably close in age to

most of the participants which seemed to facilitate the discussion. For many participants, English was not the first language, and some of them commented on their perceived lack of a good command of English. I stressed that I am also a speaker of English as a foreign language, and it appeared to me that my accent reduced the distance between myself and the respondents. I adjusted my pattern of interaction and behaviour to the participants: If they wished to meet with me in a very formal setting, for example a hotel lobby, I complied. If they felt most comfortable speaking to me in their work environment, even if there were numerous interruptions due to clients coming in, I made this work. I dressed for the interviews in a similar fashion to what I expected the interviewees to wear based on the context and meeting venue. These measures seemed to enhance the level of trust between me and the participants. Furthermore, it helped me to gather as much background information as possible about the context in which I was going to conduct the interviews. Learning from third parties about the kinds of assumptions that potential study participants made about me, and questions they asked about me, provided me with information regarding the issues I needed to address in the first part of the interview, before I started any audio taping.

Snowball sampling was clearly the only viable recruitment technique in my case. The most important learning outcome for me in this context was to have some trust, just as I expected the participants to trust me. Planning in many parts of the world does not proceed in the same way as in North America. I arrived in both major study locations (Nassau and Accra) without a single interview set up in advance in terms of having a concrete date and time for the interview. I learned to trust the process and, above all, to trust the local organizers who acted as superb advocates for me. Having said this, any

researcher ought to be aware that snowball sampling is a highly subjective undertaking. The local organizers inevitably had more access to certain graduates with whom they were in close contact, over others with whom they had only loose contact or no connection any longer. This posed a particular challenge in Ghana where graduates are much more widely dispersed across the country than in the multi-island nation of the Bahamas, where most graduates are concentrated in the capital city. A certain level of subjectivity in the snowball sampling process does not diminish the legitimacy or validity of a study as long as the researcher stays aware of the limitations that the research design imposes on the scope of the research and the conclusions that can be drawn. Researchers are also well advised to check whether the resulting snowball sample is diverse in regard to those demographics that are not subject to the limiting factor. In the case of my study, the limiting demographic, particularly in Ghana, was geographic: all participants resided in the Greater Accra Region at the time of the interviews. However, the sample was diverse with respect to gender (concomitant with the overall gender representation on the Isle of Youth program), date when graduates went to Cuba, postsecondary programs pursued in Cuba, and sectors of current employment (private, public, small and large organizations). The fact that a large number of graduates identified Greater Accra as their Region of origin could be linked to the limitations imposed by snowball sampling since many might have returned to the Region from which they originally departed for Cuba.

International research is expensive. A PhD researcher with no university funding who has to use her savings to pay for her research is subject to some additional limitations. Specifically, I knew that I would be unlikely to have an opportunity to do a second round of interviews, which meant that I had to “get it right the first time” to the

extent possible. This is a particular concern for a first-time researcher who is bound to make some mistakes. The inability to do second interviews poses a challenge in the context of exploratory, qualitative, semi-structured interviews where subsequent interviews benefit from ongoing optimization of the questionnaire guide based on answers provided by previous interviewees. In such a situation the researcher would ideally conduct second interviews, elaborate on topics raised in the first interview that need further interrogation, and ask questions that might have entered the questionnaire guide later because the researcher was unable to discern the importance of certain questions in the beginning. A researcher conducting international work under considerable resource constraints ought to think carefully about how to mitigate the challenges I have outlined. In my case, for example, I found it helpful to transcribe all interviews on site while in the Bahamas as this practice enabled me to make changes to the questionnaire early in the process.

One of the ways to give something back to the participants at the heart of my study is the book project discussed below which will extend the dissemination of the insights I gained through this work beyond scholarly publications. I will also make available all the photos I took in the school in February 2008 to the administrator of the [ESBEC.COM](http://ESBEC.COM) website. These photos do not belong to me, but to the Esbecans.

### **Implications for Policy Practice**

With this study I examined the impact of a South-South scholarship program on a selected group of graduates, as experienced and seen through the eyes of these graduates and a number of former administrators (senior public servants and teachers). In particular, I searched for links between the graduates' experiences with this program and their

subsequent inclination to return to Ghana, stay in Ghana, or consider going abroad. The study was set in the context of the brain drain inducing practices of industrialized countries in the North at a time when the demographic trends in those countries are expected to continue, resulting in the aggressive pursuit of graduating international students for immigration purposes. The intent of the Isle of Youth program was laudable, and the participants' accounts of lived experiences suggest that more graduates might have returned to live and work in Ghana had the program not failed to fulfill some of the graduates' expectations upon finishing their degree program in Cuba.

Overall, the participants identified one of the major shortcomings of the program to be related to changes of the direction in which the Ghanaian government took the country throughout the 1980s and 1990s. The study therefore affirms the need to apply a long-term time horizon to educational programming: Subjecting educational programs to the vagaries of changing government priorities and political parties can be detrimental to any sustainable development of a country's education systems. One graduate observed that the recognition of Cuban degrees should be constitutionally enshrined in Ghana and that it was unacceptable that this was something that one government could give, and another government could take away at its discretion. Included in such long-term educational programming should be a plan for project tracking after the end of a project. In the case of the Isle of Youth program, an exit survey upon graduation from the Cuban postsecondary system, and follow-up surveys at regular intervals after the graduates' return to Ghana, would have provided important data on the graduates' experiences which would then form the basis for changes to the program. Also, proper statistical tracking of graduating students might have provided information on the graduates'

migration patterns. In the absence of such tracking, the [ESBEC.COM](http://ESBEC.COM) website constitutes an important tool that allows for some inferences on the graduates' movement over time.

Scholarships – whether North-South or South-South - to low-income students in the Majority World alone do not ensure that the human capacity thus created at the personal level will be used effectively for the development of the graduates' respective countries. Harnessing human capacity for a broader societal purpose takes more than the sum total of the capacity built in a large number of individuals. Raising awareness in societal institutions, including public and private employers, about the competencies with which scholarship students return to their home countries, might greatly enhance the chances that the human capacity thus created can be effectively put to use for the benefit of society at large.

The study further emphasizes the importance of integrating various levels of education. The World Bank's practice of abandoning one sector for another, depending on the latest thinking of the Bank's strategists, is not conducive to the long-term development of a well-integrated education sector. A vertically and horizontally integrated approach is necessary that acknowledges the need to build capacity at several levels concurrently, and along different dimensions at the same level (for example, university-level and technical/vocational level for postsecondary education).

Although the study sample is too limited to draw any broadly generalizable conclusions on brain drain, the experience of these graduates suggests that the lure of higher incomes in industrialized countries may not be as strong as neo-liberal economists make us believe. The study indicates that most graduates were not inclined to seek better conditions elsewhere as long as they were being appreciated at home upon return, and as

long as some level of effort was extended to help them reintegrate into society.

Scholarship authorities typically put detailed and administratively complex measures in place to select scholarship students for study abroad. The study suggests that it would not take much to ensure that some attention was also given to those students when they return, thus greatly reducing the potential for frustration which can ultimately lead to outmigration.

Other major goals of the Isle of Youth program were its aspirations to have an equalizing impact by allowing access regardless of students' socio-economic and geographic background, and to combine liberal and utilitarian functions of education through linking the world of study with the world of work. The program attempted to address the access issue through early recruitment at the lower secondary level. In light of the high attrition rates between primary and secondary, and secondary and tertiary levels in the Majority World, policy makers who design scholarship programs for students from developing countries ought to consider mechanisms to ensure that they are not only supporting the children of the elites.

The question of practical applicability of postsecondary education programs in the context of international scholarships is crucial to the combination of liberal and utilitarian functions of education. South-South policy makers ought to pay particular attention to this aspect, given that governments in industrialized countries appear to have little interest now and in the foreseeable future to provide international students with an education that is useful in the students' home country context. On the contrary, Northern governments and, by extension, education institutions in those countries can be expected to increasingly focus on integrating international students into the host country's

economy by providing them with an education that is primarily relevant to the host country context. Herein lies a major challenge and opportunity for future South-South relationships and programs for educational assistance.

### **Recommendations for Future Research**

Before discussing future research, I would like to get back to an idea that surfaced in the Bahamas during my discussions with participants: editing a book for both academic and non-academic audiences, based on the experiences of selected graduates and administrators with the Isle of Youth program. I envision this book edited by me and with a foreword and afterword written by myself, while each chapter would be written by a different graduate or administrator, and would recount a particular aspect of the program from the perspective of its author.

With respect to future academic work, several major areas for future (comparative) research flow from this study.

### **Program Evaluation of the Ghana-Cuba Isle of Youth program**

As outlined a number of times in this dissertation, my study did not constitute an evaluation of the Isle of Youth program between Cuba and Ghana. The findings suggest that such an evaluation might be timely. I would not have been able to conduct such a comprehensive program evaluation since I did not have the resources necessary to interview a larger number of graduates residing in remote areas of Ghana and in other parts of the world. In the limited time allocated to a doctoral study of this nature, I would also not have been able to gain access to source documents such as the annual bilateral agreements between Cuba and Ghana which are likely classified. A researcher might have to apply under the respective legislation (the equivalent of Canada's Freedom of

Information Act) to gain access to these documents - a potentially time-consuming process. It is advisable for any comprehensive program evaluation to include a comparative group of Ghanaian-trained or non-Cuban trained graduates. Also, employers and co-workers of graduates trained in different settings ought to be consulted to gain a perspective on the various groups' performances that goes beyond the graduates' self-reported accounts. A formal program evaluation would have to include a quantitative complement to overcome the limitations resulting from gaps in human memory in the present study. Finally, a formal program evaluation would include the perspectives of politicians who formed part of the government in Ghana and also in Cuba at the time when the program was planned, implemented, and closed down.

Another area for future research building on this study lies in the comparison of findings related to the Cuba-Ghana scholarship program with other South-South scholarship programs. Comparing the findings related to the Cuba-Ghana scholarship program with the impact of scholarship programs on other student populations will provide further insights into ways of ensuring that academically deserving, yet economically disadvantaged students receive an education that is relevant to the context in which they are going to work. In this regard, the experiences of graduates from other African nations who studied in Cuba, or of graduates from horizontal scholarship programs between other countries (e.g., the India-Malaysia program), as well as the experiences of graduates from Ghana and other African countries who studied in the industrialized part of the world, are of interest. A number of different comparative studies are possible:

### **Comparative Research Involving other African Recipient Countries of Cuban Scholarships**

As outlined earlier, this research built on the important groundwork carried out by Anne Hickling-Hudson with students and recent graduates from the Caribbean who studied at Cuban universities. This study has expanded the research frame in three major ways:

1. Geographic: reach extended to the African continent
2. Temporal: study participants graduated up to 18 years ago from their Cuban postsecondary institutions
3. Scope: participants studied at secondary, pre-university or technical/vocational, and postsecondary levels in Cuba

While the Cuba-Ghana program was underway on the Isle of Youth, many other African countries were also represented on the Isle. Some of these countries had more than one school (Angola, Mozambique). In principle, their programs were similar to the one for Ghana, but since the secondary schools were offshore schools of the respective countries, some differences can be expected. Some of the questions to which a follow-up comparative study may provide answers are as follows: Did other countries avoid some of the pitfalls of the Ghanaian program? There was an indication during this study that other nationalities sent students home every two to three years – what difference did this make for the students' morale and for reintegration into their home society after completion of postsecondary studies? It was also pointed out by graduates in this study that other schools had a more balanced gender distribution – how did recruitment work in that regard? What mechanisms were used to remove barriers to female participation? What types of placements (polytechnical/university) did these countries negotiate and

why? How did they prepare the ground at home for receiving the returning graduates?

What was the reintegration experience of those graduates into their home societies? What was the incidence of subsequent outmigration in those societies?

### **Comparative Research Involving other South-South Scholarship Programs**

As outlined in chapter 2, in the section on How the South Can Learn from the South, I have alluded to a number of other South-South educational programs, some of which also involve scholarships. It would be illustrative to investigate the mechanisms through which such programs operate; whom they target; how recruitment works; what the major objectives of these programs are; how program relevance to the receiving students is ensured; whether and what mechanisms are employed to ensure the students' return to their home countries; what the incidence of outmigration is at the end of the program; and other questions that have arisen in the context of this study. Findings could be compared with the results of this study and/or any future program evaluation that is carried out in order to obtain a tool for assessing what types of approaches are most effective to achieve defined program objectives.

### **Comparative Research Involving Scholarship Students Coming to Canada**

Canada has few scholarships for students from low-income countries, but some programs are available, in particular at the graduate level. This study has focused on the Cuba-Ghana program as an alternative to traditional North-South programs. Most literature on North-South educational linkages and issues related to brain drain focus on the experiences of those graduates who have left their home countries, rather than the experiences of those who have returned and are working at home. A comparative study of Majority World students who have studied in the North on a scholarship and who have

either returned to their home country, have stayed behind in the host country, or have moved to a third country, may provide some responses to the following questions: What are the experiences of graduates with this program as compared to the Cuban scholarship program to other developing countries? What were the conditions for return? Were any incentives or punitive measures put into place – and if so, what types of incentives and punitive measures - to ensure the students' return? How were these measures enforced? For those graduates who returned, what was the incidence of later outmigration? How relevant did the graduates find their Canadian education in light of their home countries' context?

### **Concluding Remarks**

References to Cuba in the Western world often conjure up images of a country frozen in time, pursuing its utopian communist dream. These are the more benign reactions. Oppositional reactions involve a fierce rejection on political grounds and a condemnation of Cuba's political leadership, above all, of its former leader Fidel Castro. When I present at conferences outside Cuba about my research into the Cuban scholarship program, a percentage of the audience will immediately "go into opposition" and suggest that it is obvious Cuba is offering scholarship programs for political purposes, to win over other nations as friends in a capitalist world order hostile to the last remnants of a bygone communist era. Such accusations would, of course, not be made if I spoke about the Rhodes Scholarships, Fulbright Scholarships, Commonwealth Scholarships, or any other "respected" scholarship scheme devised in the capitalist world.

The unease about Cuba may partly explain why little research has been carried out to date into the Cuban scholarship program, in spite of the attention that has been given to

South-South relationships over the past decades. My research aimed at addressing this gap through examining the scholarships provided at the secondary and postsecondary levels to Ghanaians as an attempt to deal with educational needs in postcolonial societies through a horizontal model of development assistance. The lens I applied to this study was the lived experiences of a group of program graduates and former administrators (civil servants and teachers). The study participants pointed to the various achievements of the Isle of Youth program, but also outlined ways in which the program's potential for further development and optimization, in their opinion, had been compromised by political developments in Ghana. The program was thus widely regarded as not having fully reached its objective, as originally envisaged, to employ all graduates in Ghana in professional careers critical to the country's human, social and economic development. In order to become sustainable over time, Ghana and Cuba would have had to continue determining their goals, drafting the respective policies, measuring the results and making changes to ensure the intents of the program were fulfilled. However, this did not happen, and due to the shortfalls perceived by the study participants and discussed at various points in this document, many graduates ultimately left Ghana or did not ever return to Ghana after finishing their studies in Cuba.

For centuries, the North has exploited the South to support its own economic development, while in the process underdeveloping the majority of this world. It is timely for Southern nations to be aware of their strengths, to identify their areas of expertise, to harness their capacities, and to extend assistance in these areas to other Southern nations. Although such assistance models may initially to some extent still resemble the former colonial models, or those of the former Soviet Bloc, over time they may grow into more

authentic and indigenous models that are increasingly responsive to developing countries' needs. This process necessitates a careful analysis and assessment of programs such as the Isle of Youth program, adopting and adapting successful elements, discarding challenging elements, and blending these models with indigenous educational philosophies. In spite of all its reported challenges and failures, the majority of participants in this study regarded the Isle of Youth program as a worthwhile undertaking which could inform future collaboration efforts.

**Figure 5 Students' drawings: José Martí**



“Los niños son las esperanzas del mundo.” (Children are the hope of the world.)

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**APPENDIX A**  
**Message posted on ESBEC.COM website**

Inviting your participation in a research study

8/2/2007 1:39:18 AM

Dear Ghanaian Graduates from Cuban Universities: I am a doctoral student at the University of Victoria in Canada, and am also Assistant Director of the International Affairs Office of that University. I am planning to undertake a research study on the impact of the Cuban scholarship program on students from other countries, with focus on two or three African countries, one of which is Ghana. I have discussed my research with Dr. Francisco Martínez, the Head of the Office of Foreign Students at the Cuban Ministry of Higher Education, who is currently working on a sabbatical in the Bahamas. Francisco is very kindly supporting my research and has already been in touch with some of your colleagues who are also working in the Bahamas. I will meet with them in March in order to start my interviews with Ghanaian graduates from Cuban institutions. I am hoping to travel to Ghana later this year in order to continue the interviewing process. I am therefore looking for graduates who are willing to participate in this study. All I would need is an e-mail from you, expressing your interest in participating. I will then contact you individually and provide more information on this research. I can be reached at: [sabine@uvic.ca](mailto:sabine@uvic.ca). I am also interested in graduates from Ghana who studied in Cuba and are living in other countries. Thank you very much in advance for considering this request. I look forward to hearing from you. Best regards, Sabine

Sabine Schuerholz-Lehr, Canada

[sabine@uvic.ca](mailto:sabine@uvic.ca)

## **APPENDIX B**

### **Interview guide for graduates in the Bahamas**

#### *Interview guide for Cuban program graduates from Ghana in Nassau*

- (1) Biodata:
  - What program did you study in Cuba?
  - At which institution did you study?
  - When did you first go to Cuba, and when did you graduate?
- (2) Why did you decide to get a postsecondary education?
- (3) Why did you decide to study in Cuba? How were you selected for the Cuban Scholarship Program?
- (4) Was studying in Cuba your first choice or preference, or would you rather have studied elsewhere? Why? Did this perception change over time?
- (5) What do you see as the strengths of the Cuban program? Any areas where you were disappointed?
- (6) Did you participate in a service learning/practical component of your study program? How useful was this?
- (7) Describe in detail your experiences and professional path after you finished your studies in Cuba. How did you come to Nassau?
- (8) Did you ever have to sign a contract with the government of Ghana when you were selected for the Scholarship Program? If so, for how long was the contract in place? What did it ask you to do?

- (9) Describe in as much detail as possible how your studies in Cuba, both academic and practical components, relate to the work you are currently doing here in Nassau.
- (10) What factors motivated you to take up work in the Bahamas? Would you ever consider moving back to Ghana and working there? Or would you consider moving to another country? What would motivate you to move to another country?
- (11) What do you see as the main similarities and differences between Cuba, Ghana and the Bahamas?
- (12) How have these similarities and differences affected the usefulness of your Cuban education in your current professional and personal life? How well did your Cuban education prepare you for the work you are currently doing?
- (13) What does the term “development” mean for you? Has your understanding of development changed during your studies in Cuba, and if so, how?
- (14) What do you see as the main strengths and weaknesses of contemporary Ghana?
- (15) What social, economic, cultural, educational, or other changes would you like to see happening in Ghana?
- (16) What connections do you see, if any, between your country’s colonial history and its contemporary situation?
- (17) In which ways, if at all, do you think that your Cuban education might be helpful in addressing some of the issues that Ghana or other countries currently face?
- (18) Do you see this program being different from scholarship programs or other development programs designed and delivered by agencies and institutions in richer industrialized countries? If yes, how?

## **APPENDIX C**

### **Interview guide for graduates in Ghana**

#### *Interview guide for Cuban program graduates from Ghana in Ghana*

(1) Biodata:

What program did you study in Cuba at the tertiary/university level?

At which institution did you study?

When did you first go to Cuba (to the Isle of Youth), and when did you graduate?

(2) Why did you decide to get a postsecondary education?

(3) From which of the Ghanaian Regions did you come originally, and how were you selected for the Cuban scholarship program? How old were you, how did you feel about the program then, what perceptions did you have of Cuba and/or the program? What do you remember from the orientation you received before departure?

(4) Was studying in Cuba your first choice or preference, or would you rather have studied elsewhere? Why? Did this perception change over time?

(5) What do you see as the strengths of the Cuban program? Any areas where you were disappointed? Please think about your time on the Isle of Youth AND your postsecondary education.

(6) Did you participate in a service learning/practical component of your study program at the tertiary level? How useful was this?

(7) Describe in detail your experiences and professional path after you finished your studies in Cuba, including your experience of re-entering Ghana.

- (8) Describe in as much detail as possible how your studies in Cuba, both academic and practical components, relate to the work you are currently doing here in Ghana. In which ways did your Cuban education prepare you for the work you are currently doing?
- (9) As you know, some of the ESBECANs moved to other countries, either directly from Cuba or after having been back to Ghana. What factors motivated you to return to Ghana and stay until now? Would you ever consider moving to another country? What would motivate you to move elsewhere?
- (10) What do you see as the main similarities and differences between Cuba and Ghana?
- (11) How have these similarities and differences affected the usefulness of your Cuban education in your current professional and personal life? How well did your Cuban education prepare you for the work you are currently doing?
- (12) Now that you have been back from Cuba for a while and understand the needs of Ghana better, do you think the programs/careers offered were the “right” ones for Ghana? Were any programs missing that you think would have been important for Ghana?
- (13) Apart from the technical training that you received in Cuba, did you ever discuss development issues? Was this part of the curriculum? What does the term “development” mean for you?
- (14) What do you see as the main strengths and weaknesses of contemporary Ghana? Based on your experience with the Cuban system, what types of changes (social, economic, cultural, educational, political, etc.) would you recommend for Ghana?

- (15) What connections do you see, if any, between your country's colonial history and its contemporary situation?
- (16) How do you think you as an ESBECAN can contribute to positive change in Ghana, if at all?

## **APPENDIX D**

### **Interview guide for administrators**

*Interview guide for administrators/government representatives involved in setting up scholarship program between Ghana and Cuba*

- (1) Could you please start by describing your involvement and role in the Isle of Youth scholarship program between Ghana and Cuba?
- (2) Why did Ghana decide to sign an agreement with the Government of Cuba which allowed a limited number of Ghanaian students to study in Cuba on a scholarship?
- (3) What were the main features of the arrangement between Ghana and Cuba?
- (4) What do you see as the main advantages and disadvantages of this program, and for Ghanaian students studying in Cuba?
- (5) How did the selection process work?
- (6) What was the purpose of the dual work and study component during the secondary years of study in Cuba?
- (7) Were you involved at all in choosing the study programs which the Ghanaian students attended at the post-secondary or university level?
- (8) Are these programs priority areas for Ghana? Why?
- (9) In your experience, what professional paths did graduates typically pursue if they returned from Cuba to Ghana?
- (10) How do you see the Cuban curriculum and both its academic and practical components relating to the work that graduates do in Ghana?

- (11) What is the incidence of graduates moving to another country for work after their return from Cuba? From your perspective, is this problematic? Please explain.
- (12) Does Ghana have any laws, regulations or incentive systems in place to prevent Cuban program graduates from moving to another country for work? If yes, please describe these systems in detail.
- (13) Was there any contract signed with Scholarship recipients that mandated them to do service in and for Ghana for a certain period of time after they obtained their degree in Cuba? What exactly were the conditions of such contracts?
- (14) What do you see as the main similarities and differences between Cuba and Ghana? How do these similarities and differences affect the usefulness of a Cuban education in the graduates' future life?
- (15) How do these similarities and differences affect the usefulness of a Cuban education for Ghana's needs?
- (16) What does the term "development" mean for you in the context of Ghana?
- (17) What do you see as the main strengths and weaknesses of contemporary Ghana? What social, economic, cultural, educational, or other changes would you like to see happening in Ghana?
- (18) What connections do you see, if any, between your country's colonial history and its contemporary situation?
- (19) In which ways, if at all, do you think that the Cuban graduates might play a role in addressing some of the issues that Ghana currently faces?
- (20) Might the Cuban Scholarship Program serve as a model of a development program between economically poorer countries? How?

## **APPENDIX E**

### **Interview guide for teachers**

#### *Interview guide for teachers who taught in ESBEC 22 at secondary level on the Isle of Youth*

- (1) Could you please start by describing your role and involvement in the Isle of Youth Program. What year did you go there? For how long did you stay? What did you teach?
- (2) How were you selected to participate in the program?
- (3) How many classes and age groups did you teach?
- (4) Who set the curriculum?
- (5) What challenges did you encounter while teaching on the Isle of Youth?
- (6) Were you at all involved in choosing students for the Isle of Youth program?
- (7) What was the purpose of having Ghanaian teachers accompany the students to Ghana?
- (8) How do you see the impact on the students of not being able to go home and see their families for many years?
- (9) What do you see as the main advantages and disadvantages of this program and for Ghanaian students studying in Cuba?
- (10) How did the students cope with the dual work & study component?
- (11) Were you involved at all in choosing the study programs which the students attended at the postsecondary level?

- (12) How did the assessment work for the “work” part of the curriculum, in particular?  
Were you involved in the annual selection of the highest achieving students who got to go home for a visit?
- (13) How do you see the Cuban curriculum with its academic and practical components relate to the work that graduates do in Ghana?
- (14) What do you see as the main similarities and differences between Cuba and Ghana?  
How do these similarities and differences affect the usefulness of a Cuban education in the graduates’ future life?
- (15) What components of the program would be useful to implement in Ghana today?  
Has Ghana adopted any of the features of the Cuba-Ghana bilateral program?
- (16) In what ways, if at all, do you think that the graduates from Cuba might play a role in addressing some of the issues that Ghana currently faces?
- (17) Might the Cuban scholarship program serve as a model for a development program between economically poorer countries? And how so?

## APPENDIX F

### Consent form for study participants

#### *Letter of Consent*

Dear \_\_\_\_\_,

I am a PhD student/doctoral candidate in the Department of Curriculum and Instruction, Faculty of Education, at the University of Victoria in British Columbia, Canada. For my doctoral dissertation, I am hoping to examine the nature of Cuba's South-South model of international co-operation through tertiary education scholarships to developing country students that aims at capacity building in developing countries. After meeting with Cuban officials who have responsibility for the Cuban tertiary scholarship program in Havana in February 2006, I decided to focus my research on the experiences of students from Ghana. I greatly appreciate your participation in this research.

If you would agree to meet with me, I would be grateful. Your decision to meet with me is entirely voluntary and you are free to refuse to participate or to answer certain questions, without any negative consequences. You may cancel our meeting at any time. In the event that you cancel, any information you have provided me will be destroyed. Participation in this meeting with me will not cause you any harm or inconvenience, and should take approximately two hours. However, by meeting with me you will be helping me to gauge the feasibility of the Cuban South-South collaboration model as part of my doctoral dissertation. A better understanding of this model of international education would be beneficial in several respects. It would provide the broader international community with an assessment of the importance for the development process of a contextually-adequate tertiary education that combines academic study with productive work and research. It would also provide a grounded assessment of the impact of the Cuban model of South-South collaboration in higher education with regard to curbing the brain drain from low-income countries in general, and the impact on Ghana in particular. This might have significant implications for development programming in countries such as Canada. Finally, it might inform Cuban researchers and decision makers about future programs and interventions that aim to further support South-South or 'horizontal' collaboration.

During our conversation I will be using an interview guide including approximately 20 questions to get your feedback. I might audio tape the interview in order to be able to focus on our conversation. You will be able to request to either be identified or not in my dissertation and any other report resulting from my research. In case you do not want to be identified, I will advise you of the limits to anonymity and confidentiality due to the relatively small number of participants in this study. All notes taken during our meeting, and all audio tapes, will be destroyed at the finalization of my doctoral research study, should you feel that it is feasible and worthy of being undertaken.

If you are still concerned about potential consequences resulting from your responses regarding the scholarship program, please remember that you have the right to not answer particular questions and that all your responses will be treated confidentially. I will furthermore offer you the opportunity to verify your interview transcript and to remove any responses that cause you concern.

I will use the information collected during the interviews in my PhD dissertation, as well as in several reports and scholarly publications resulting from my dissertation.

If you have any questions about the nature of our meeting, please do not hesitate to contact me by e-mail at [sabine@uvic.ca](mailto:sabine@uvic.ca), or by phone at ++1-250-881-8824. You can also contact my doctoral supervisors from the University of Victoria, Dr. Alison Preece, at [apreece@uvic.ca](mailto:apreece@uvic.ca), or by phone at ++1-250-721-7831, and Dr. Helen Raptis, at [hraptis@uvic.ca](mailto:hraptis@uvic.ca), or by phone at ++1-250-721-7776. In addition to being able to contact myself and my co-supervisors at the above phone and e-mail numbers, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Associate Vice-President, Research, at the University of Victoria (phone: ++1-250-472-4545, or by e-mail: [ethics@uvic.ca](mailto:ethics@uvic.ca)).

Sincerely,

Sabine Schuerholz-Lehr

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Having understood the above information and been given an opportunity to have my questions answered, I agree to participate in this meeting.

Participant name: \_\_\_\_\_ Date: \_\_\_\_\_

Participant signature: \_\_\_\_\_