

A Rationale for Reconfiguring Tertiary Education in Montserrat & the OECS to Meet the Life-long Learning Challenges of the Twenty-First Century

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Introduction

Today, the Caribbean and the rest of the world are experiencing the full-blown effects of the new globalized economic order bolstered by neo-liberal economic philosophies very evident in, for example, the rise of 'borderless' transnational/multinational corporations, the creation of powerful trading arrangements such as the North American Free Trade Agreement (NAFTA), the increasing homogenization of culture, the multi-skilled employee, as well as revolutionizing technologies such as the Internet. Societies are in transition from being primarily producers of goods to societies in which information and the means of knowledge production, processing, and transfer predominate. National and regional outlooks are as a result being transformed or superseded (albeit not without contestation) by global visions and perspectives, a fact which has had direct implications for the most personal aspects of the lives of Caribbean citizens. In this new and exciting environment organizations, not least educational ones, are faced with the challenge of changing and adapting in order to prepare for, and spearhead, the entry and prosperity of their respective nation states into the new, highly competitive and uncertain international socio-economic and political environment. This paper presents a rationale for reconfiguring of the role of tertiary education in Montserrat and the OECS to meet the life-long learning challenges of the twenty-first century.

Worldwide, it has now become a compelling imperative that tertiary institutions engage in mutually beneficial dialogue, practical cooperation, and adopt strategies to effectively deal with the challenges of change, its attendant uncertainties, as well as position themselves to optimally exploit the manifold possibilities for new and exciting opportunities. It is not surprising then that at this early juncture in the new millennium, the University of the West Indies (UWI) and the other tertiary institutions in the region, as with similar educational institutions throughout the world, are embarking on profound changes under the impetus of the forces of globalization and the corresponding need, in particular, to internationalize their structures, practices and services, as well as embrace new educational technologies and instructional modalities emanating from the revolution in electronics and informatics.

In the Caribbean, as elsewhere, there exist a certain degree of consensus, by no means unchallenged, that the education system, both its formal and non-formal aspects, is the primary institutional mechanism through which the development and utilization of human resources, and consequently national development, might be achieved and maximized. This is so in spite of the fact that there is as yet no clear consensus among academics or practitioners on the meaning, nature and dimensions of the notion of development, especially as it relates to the developing world. The word development remains an ambiguous concept, one often clouded with political and ideological overtones, and while it is increasingly viewed as being a multidimensional concept (as opposed to a one-dimensional economic one) very few attempts have been made to investigate the interrelationships between, for example the economic, cultural, ideological, political, and other dimensions, notwithstanding the outstanding efforts of the various UNDP *Human Development Reports*, initially developed under the brilliant leadership of the late Mahbub ul Haq. Not surprisingly then, the belief that education is an integral part of development is still imperfectly understood, and still undergoing critical analysis and reassessment. Nevertheless, under the impetus of nationalist aspirations, the belief that education could lead to improvements in living conditions, funding from UNESCO, the World Bank, and other international agencies, and the strengthening influence of human capital theory, governments in the Caribbean and other parts of the developing world allocated greater portions of their national budget to education.

Education in the Context of Development

Until the late 1950s and the early 1960s it was usual, at least among most economists, to conclude that the various forms of physical and financial capital including land, labour, gold and the like, were the key resources to be exploited or developed in order to maximize national development. In recent times, however, as Todaro

correctly observes, “most economists would probably agree that it is the human resources/capital of a nation that ultimately determines the character and pace of its economic and social development”.¹ Nancy Birdsall of the Inter-American Development Bank (IADB) elaborates:

Education, the most easily measured form of human capital, is, like land and other forms of wealth, an asset. In today’s global markets, it is a scarce asset, and can therefore, generate income for its owners. It is a special asset in two respects. First, once acquired, it cannot be stolen or sold — it cannot be alienated from its owners. Second, as the amount of education increases, other assets such as land and physical capital decline as a proportion of total wealth in an economy; since the ownership of these latter assets is usually more concentrated than that of education, the overall concentration of all assets declines. Thus, an increase in education is likely to have an equalizing effect as long as it is broadly distributed.²

Some may argue, perhaps with a degree of justification, that in contemporary Caribbean societies, as indeed globally, the primary function of education seems to be increasingly heavily biased towards making citizens more efficient in commodity production. However, as Anne Case of Princeton University has pointed out, “the primacy of education in the development process stems not only from the fundamental role of education in production, but also from the many and varied ways in which education enhances the quality of life and, in turn, promotes and sustains development... in income generation, in the promotion of health status, and in the reduction of fertility — all of which contribute to sustained development and justify education a place in the core agenda of the World Bank.”³ Indeed, in the context of the Caribbean the difference in relative scale and nature of the investments in human capital development over time is one of the explanations which has been given by some economists to explain the relatively more stable and dynamic growth and development of the Barbadian economy in contrast to the historically more turbulent experiences of, for example, Jamaica which is strikingly richer in natural resources such as bauxite and timber, among other things.⁴

Frederick H. Harbison has also argued that human resources are the ultimate basis of the wealth of nations and therefore the “goals of development are the maximum possible utilization of human beings in productive activity and the fullest possible development of the skills, knowledge and capacities of the labour force”.⁵ Human resources, according to Harbison, comprise “the energies, skills, talent, and knowledge of people which are, or which potentially can or should be, applied to the production of goods or the rendering of useful services for the social, political, cultural and economic development of nations”.⁶ Crucially, however, underutilization of human resources is regarded by Harbison as the most serious and intractable problem facing less developed countries, and is manifested in the form of open unemployment, underemployment, disguised unemployment and mal-unemployment. The key dimensions of the human resource problem in developing countries such as those in the Caribbean, relate firstly to the underdevelopment (or persistent use below its potential socio-economic development) of skills, knowledge, and talents of persons in the labour force, and secondly, to those stemming from underutilization of their energies and capabilities.

Although possessing or exhibiting distinct characteristics or manifestations these dimensions of the human resource problem are often, especially in the developing world, interrelated, as the underdevelopment of human resources is to some extent a cause of underutilization and vice versa. The task of conceptualizing the problem becomes additionally difficult and problematic given that there is still no comprehensive indicator of human resources development, that is, no accepted yardstick for measuring the development and utilization of human resources.⁷ Even more troubling and more fundamental, there are those authors like Chinapah et al., who argue with justification, that there is need for a reinterpretation of the notion of human resources and their development, which would encompass a much wider range of human competence than those that are relevant to productive work in the economic sector. A new conceptualization should instead include those resources and skills which human beings need to protect and improve people’s health, to keep population growth within reasonable limits, to sustain and develop cultural traditions and identities, to enjoy recreational activities, to put nutritional resources to the best possible use, to preserve a less hazardous and endangered environment, and to assume and play an active role as a citizen.⁸

Despite the recognition that education is vital to national development, it has now become fashionable for some academics and policy makers to speak about the “crisis in education” and its apparent failure to meaningfully contribute to the real needs of social, economic and overall national development. Studies have shown that the educational system of many developing nations such as those in Latin America rather than fostering justice and equity function to increase rather than decrease income inequalities.⁹ Not surprising, in some quarters a powerful challenge has been mounted especially against the “cult of formal education” as Todaro¹⁰ explains:

After almost three decades of rapidly expanding enrollments and hundreds of billions of dollars of educational expenditure, the plight of the average citizen in many parts of Asia, Africa, and Latin America seems little improved. Absolute poverty is chronic and pervasive. Economic disparities between rich and poor widen with each passing year. Unemployment and underemployment have reached staggering proportions, with the “educated” increasingly swelling the ranks of those without jobs.... many of the early claims made on behalf of unfettered quantitative expansion of educational opportunities — that it would accelerate economic growth; that it would raise levels of living especially for the poor; that it would generate wide-spread and equal employment opportunities for all; that it would acculturate diverse ethnic or tribal groups; and that it would encourage “modern” attitudes — have been shown to be greatly exaggerated and, in many instances simply false. As a result there has been a growing awareness in many developing nations that the expansion of formal schooling is not always to be equated with the spread of learning; that the acquisition of school certificates and higher degrees is not necessarily associated with improved ability to undertake productive work; that education oriented almost entirely toward preparation for work in the modern urban sector can greatly distort student aspirations....

To make matters worse, as finances and resources shrink there has been a corresponding increase in competition for scarce resources not only between education and other sectors of the economy but within the educational sector itself, due in part to influential World Bank studies and funding policy orientation.

During the 1970s and 1980s Rate-of-Return analysts produced empirical, but now highly controversial and heavily criticized, studies showing that the private and the social rates of return to investment in education were the highest at the primary levels. These analyses exerted powerful influence on education systems worldwide, and the evidence on the surface, as well as the social returns on investments in primary and secondary education over time, seemed to confirm the value of these studies. Over several decades countries around the world were able to significantly raise their literacy rates through massive expansion of access to primary and secondary education. These achievements were certainly quite dramatic in the Anglophone Caribbean. As Edwin Carrington, Secretary-General of CARICOM has observed:

The CARICOM member states have improved literacy rates over the last (50) fifty years. Literacy rates reported for CARICOM member states in the Human Development Report 2001, ranged from eighty-two per cent (82%) in St. Vincent and the Grenadines to ninety-seven (97%) in Barbados. These literacy levels correlate with the high enrolment rates at the primary level. With the exception of Haiti, CARICOM has achieved net primary level enrolments rates ranging between eighty-four per cent (84%) in St. Vincent and the Grenadines and one hundred per cent (100%) in Barbados.

As a result of these Rate-of-Return analyses most international funding tended to be focused on primary and secondary education arguably to the detriment of higher education. However, as the relatively recent World Bank report, *Higher Education in Developing Countries: Peril and Promise* has noted, there has since been a major turn about in that institution's position on the relative importance of higher education. While recognizing the major importance of investment in primary and secondary education, the report was critical of the Rate-of-Return perspective on higher education. It noted:^{[11](#)}

Rate-of-Return studies treat educated people as valuable only through their higher earnings and the greater tax revenues extracted by society. But educated people clearly have many other effects on society: educated people are well positioned to be economic and social entrepreneurs, having a far reaching impact on the economic and social well-being of their communities. They are also vital to creating an environment in which economic development is possible. Good governance, strong institutions, and a developed infrastructure are all needed if business is to thrive — and none of these is possible without highly educated people. Finally, rate-of-return analysis entirely misses the impact of university-based research on the economy — a far-reaching social benefit that is at the heart of any argument for developing strong higher education systems.

Despite the manner in which higher education support and funding has been stymied in the past the notion that higher education is a major key to fostering national development has been gaining greater acceptance, not so much perhaps because of fault lines in the rate-of-return analyses, as perhaps more so in other evidence which seems to support the argument giving primacy to the importance of higher education. Many economists and education analysts now believe that the successes of the countries of East Asia have in no small way been due to the fact that they possess well educated workforces.

But the arguments in favour of providing more support for tertiary education have more than an economic basis. The World Bank expresses the complex and integrated benefits of tertiary education's value to national

development quite nicely:¹²

Tertiary education institutions have a critical role in supporting knowledge-driven economic growth strategies and the construction of democratic, socially cohesive societies. Tertiary education assists the improvement of the institutional regime through the training of competent and responsible professionals needed for sound macroeconomic and public sector management. Its academic and research activities provide crucial support for the national innovation system. And tertiary institutions often constitute the backbone of a country's information infrastructure, in their role as repositories and conduits of information (through libraries and the like), computer networks hosts, and Internet service providers. In addition, the norms, values, attitudes, and ethics that tertiary institutions impart to students are the foundation of the social capital necessary for constructing healthy civil societies and cohesive cultures- the very bedrock of good governance and democratic political systems.....

Through the transmission of democratic values and cultural norms, tertiary education contributes to the promotion of civic behaviours, nation building, and social cohesion. This, in turn, supports the construction and strengthening of social capital, generally understood as the benefits of membership in a social network that can provide access to resources, guarantee accountability, and serve as a safety net in time of crisis. The institutions, relationships, and norms that emerge from tertiary education are instrumental in influencing the quality of a society's interactions, which underpin economic, political, and social development. Universities and other tertiary institutions are the cross-roads for social cooperation, which can foster strong networks, stimulate voluntary activity, and promote extracurricular learning and innovation.

Other influential international education agencies such as UNESCO have also been expressing strong support for increased attention to higher education as an important driving force of development, and most certainly the forerunner in knowledge generation for development, especially in developing countries. This developmental function of universities in the developing world was well expressed by the UNESCO International Commission on Education which observed:

No where is the universities' responsibility for the development of society as a whole more acute than in developing countries, where research done in institutions of higher learning plays a pivotal role in providing the basis for development programmes, policy formulation and the training of middle- and higher-level human resources. The importance of local and national institutions in raising the developmental levels of their countries cannot be overemphasized. Much of the responsibility for building bridges between the developed, industrialized countries and the developing, non-industrialized countries rests with them.¹³

The UWI as the designated regional university has been mandated by the governments of the region to facilitate the growth and development of the region and its people.¹⁴ It is expected to unlock West Indian potential for economic and cultural growth through the provision of high quality teaching and research aimed at meeting critical regional needs.¹⁵ The symbolic and functional importance of the UWI has been well summarized by the 1994 Chancellor's Commission¹⁶ which noted:

To the peoples of the countries of the Commonwealth Caribbean, the University of the West Indies is as much symbol as it is institution. It is regarded not simply as a repository of knowledge but as a beacon for future accomplishments.... It remains today one of the two entities which enjoy a reputation as being regionally representative. Both in function and in promise, the importance of the UWI to the future of the West Indies cannot be overstated. Should the University not fulfil the high expectations of its constituents, the well-being of the peoples resident here and the quality of their societies will unquestionably deteriorate.

This important role of the University was also acknowledged in the context of the Grand Anse Declaration, whereby Caribbean governments "in examining the long-term prospects for development, articulated recognition of the primary importance of human resource development and the expansion of scientific and technological capability to the modernization of the regional economy, and of the special value of human resource development in the exploitation of new opportunities arising in the services sector through the development of information technology."¹⁷

In this role the UWI as well as the other tertiary level institutions, both private and public, are in step with the thinking that as the twenty-first century evolves organizations may be well placed to effect unanticipated advances for society, and to resolve the most complex problems by virtue of their ability to mobilize resources and

transcend to some degree political boundaries.¹⁸ The manifold stakeholders in the regional tertiary institutions, who include the governments, private sectors, students and parents, all have high expectations with respect to the UWI and the other tertiary institutions' capacity to optimally perform their developmental role, but many recognize the difficult task ahead consequent on the increasingly complex global environment in which these institutions now operate.

Global Imperatives and Challenges to Regional Education

Caribbean countries such as Montserrat, like all others globally, now face three major but interconnected challenges, namely globalization, the growing importance of knowledge as the engine of economic development and national prosperity, and the impacts of the information and communication revolution, all of which have striking implications for their educational institutions and systems. Everywhere, educational policy debates are embedded and infused with the imagery, jargon, expectations and misapprehensions of globalization, and these debates are increasingly having profound impacts on educational practice and action. Globalization, however conceptualized and perceived, is now widely regarded as posing the most fundamental challenge to education, and how its role is defined in the twenty-first century.

All the changes in education are however being undertaken with a certain degree of trepidation, inevitable perhaps, but in this case certainly exacerbated by the fact that while the effects of globalization are everywhere being felt, its actual forces are not always readily discernible, and they often provoke contradictory and oppositional responses. On the one hand, for instance, educational planners and policy makers are being propelled to implement changes at a rapid pace in favour of convergence reflected in growth of global education, but on the other hand they are fearful of losing the indigenous peculiarities of their educational systems through the global homogenization of cultures. As British sociologist and the Director of the London School of Economics, Professor Anthony Giddens has observed, the complex set of processes known as globalization not only pulls upwards but also pushes downwards creating new pressures for local autonomy, including the revival of local cultural identities in different parts of the world.¹⁹ They must at once therefore implement changes to facilitate these often conflicting, though by no means mutually exclusive processes or imperatives.

While globalization in effect means that countries and their institutions must now operate in a highly competitive global environment, those in developing countries like the Caribbean are often hampered by the dominance of neo-liberal economic philosophies which provide the guiding light for the forces of globalization. These global forces affect all levels of education in a number of ways including causing a reorientation of the goals of public education such as preparing students to be active participants in democratic society and ensuring they acquire the knowledge and skills required to understand, prosper and live harmoniously in their societies. Consequent on the rising influence of multinational companies and the reduction of the nation state's influence there has been a significant re-orientation in the major goals of public education. To a large extent it is the economic agenda which has become the most distinguishing feature of higher education in recent times.

A remarkable degree of consensus has emerged among the corporate/multinational business elites, government officials, leaders of higher education institutions and many international agencies that education at all levels, but especially at the higher level must seek as a primary objective to be the main vehicle of achieving and sustaining economic productivity in the new globalized environment. Thus the emphasis on the importance of the multi-skilled and multi-lingual employee and the learning society, not merely for meeting the needs of the multinational corporations and new business environment, but also it is claimed to achieve optimum individual and national competitiveness and success. There is now an overriding emphasis on the economic benefits of education as opposed to the social and cultural dimensions of the educational process which in some ways are treated more as appendages. But perhaps this is not surprising given that as a result of neo-liberal economic policies such as structural adjustment, many countries in the developing world, including most of those in the Caribbean, while recognizing the need to increase the quality and amount of their human resources, find themselves less able to accomplish these goals.

The multiple changes produced by globalization have also meant that in modern-day societies knowledge acquisition, and indeed the capacity to learn how to learn, have now taken on an increased importance. The point is well put by Jamil Salmi of the World Bank:²⁰

Economic development is increasingly linked to a nation's ability to acquire and apply technical and socio-economic knowledge, and the process of globalization is accelerating cheaper labour, and more and more from technical innovations and the competitive use of knowledge. The proportion of goods with a medium-high and high level of technology content in international trade has gone from 33 per

cent in 1976 to 54 per cent in 1996. Today, economic growth is as much a process of knowledge accumulation as of capital accumulation. It is estimated that firms devote one-third of their investments to knowledge-based intangibles such as training, research and development, patents, licensing, design and marketing. In this context, economies of scope, derived from the ability to design and offer different products and services with the same technology, are becoming a powerful factor of expansion. In high-technology industries like electronics and telecommunications, economies of scope can be more of a driving force than traditional economies of scale.... At the same time, there is a rapid acceleration in the rhythm of creation and dissemination of knowledge, which means that the life span of technologies and products gets progressively shorter and that obsolescence comes more quickly... in addition, in many fields the distance between basic science and technological application is narrowing or, in some cases, disappearing altogether. The implication is that pure and applied research are not separate any longer.... This is underlined by a rich body of evidence on the impact of universities on regional development and the spillover effects of academic research on industrial research and technology and local innovation.

Finally, the rapid developments now taking place in the areas of information and communication now mean that countries and their institutions can effectively communicate and collaborate with each other and their stakeholders in the shortest possible time, in fact almost instantaneously. This innovation is no where as evident as in the field of education where distance learning technologies are now the norm in many countries as they seek to provide better quality education to more learners.

But perhaps the most sinister challenge which globalization poses for the region comes in the way it which trade liberalization and the policies of the World Trade Organization (WTO) have been compounding the vulnerability, and literally undermining the capacity of the small states of the region to channel adequate resources to such areas as health and education. The damaging effects of these policies have been detailed by Edwin Carrington, Secretary General of the Caribbean Community (CARICOM).²¹ He has observed that as a result of WTO policies the Windward Islands in particular have had their preferential access to traditional banana markets, especially the European market, severely undermined thereby considerably weakening their economies. Indeed, banana exports for the CARICOM region as whole declined from US\$193 million in 1992 to US\$152 million in 1995 ultimately reaching a low in 2000 of US\$97 million. In fact, export earnings for seven of the eleven main products exported by CARICOM countries have experienced decline. Further, as a result of the global trade agreements, imports into the region doubled between 1999 and 2000 with the gap in balance of trade widening since imports rose by 39% and exports only by 14%.

Efforts by regional governments to offset these losses through new initiatives including the enhancement of the financial services sector as a means of attracting foreign investments have also encountered severe difficulties as result of the Organization for Economic Cooperation and Development (OECD) pressures. Exacerbating the problems of the region is the fact that the Caribbean is now finding it increasingly difficult to access international financial resources from the international private sector as well as the international donor countries and agencies since they have shifted their funding focus to other parts of the world deemed poorer than the Caribbean. Other compounding factors have also been alluded to by Secretary General Carrington who noted:²²

The Caribbean has prided itself on the excellent results of its education system. In fact we advertise this factor as one of the attractions of the Region. Our educational standards allow our work force to be easily trained to adapt to the changing global environment. The challenge which we currently face however, is the drain of our skilled resources especially in the health and education sectors through active recruitment drives, especially from certain developed countries. This is occurring at the same time that these countries are making it more difficult and costly for our students to enter their educational facilities as well as at the same time as countries are forced to receive criminal elements with minimum links to the region who are being deported from these countries. The double negative social and economic impact of these policies are currently being seen in many of our Member states as critical institutions — hospitals, schools — are inadequately manned and crime surges.

Additionally, the global pandemic of HIV/AIDS is also putting stress on the capacities of regional governments to allocate more resources to education and other sectors. The Caribbean region now has the fastest growing rate of infection in the world, and in many countries HIV/AIDs has become the leading cause of death among young people, thereby negating the investments governments would have made in these young persons through education and training opportunities.

These multiple challenges and implications are among the major ones which global phenomena present for Caribbean countries and their capacity to build stronger and more relevant tertiary education institutions.

Obviously, if tertiary institutions are to achieve the maximum development of the region's human resources then they must necessarily be characterized by multiple paradigm and perceptual shifts in the next millennium. These new dispensations are urgent requirements if these educational institutions are to be instrumental in turning the region into 'learning societies', that is, societies imbued with a strong sense of identity, an enduring desire among citizens to engage in life-long learning, resilience, innovativeness, guile, a capacity to change, and all the other attributes integral to an effective response to a rapidly changing global environment.

Any review of the national development plans of the various CARICOM countries, as well as the policy statement of regional institutions, will confirm that they want their education systems and institutions to produce citizens who are not only capable of adjusting to the requirements of the changes in the labour market, but more important who are well-rounded persons capable of sharing the values needed for living together, and for engaging in nation building through active participation in civil society. Perhaps the most explicit statement to this effect has come from CARICOM which has indicated that the ideal Caribbean citizen should possess the following characteristics:

- be imbued with a respect for human life
- be emotionally secure with a high level of self confidence and self esteem
- see ethnic, religious and other diversity as a source of potential strength and richness
- be aware of the importance of living in harmony with the environment
- have a strong appreciation of family and kinship values, community cohesion, and moral issues
- have an informed respect for cultural heritage
- demonstrate multiple literacies, independent and critical thinking
- demonstrate a positive work ethic
- value and display creative imagination in the economic and entrepreneurial spheres and all other areas of life
- develop the capacity to create and take advantage of opportunities to control, improve, maintain and promote physical, mental, social and spiritual well being and to contribute to the health and welfare of the community and the country; and
- nourish in him/herself and in others, the fullest development of each person's potential without gender stereotyping, and embraces differences and similarities between females and males as a source of mutual strength.

These ideals are deemed by Caribbean policymakers to be vital not only in assisting citizens to integrate in the new global environment but also in helping them to preserve and nurture their identity as a people with a special Caribbean civilization. In essence, educational institutions at all levels, including the tertiary level, are challenged to train and educate young citizens and adults for the ultimate goals of personal, community, national and global fulfillment, security, peace, prosperity and development.

Tertiary education institutions and systems in the region have been attempting under public sector and private sector leadership and initiatives, to cross these perceptual thresholds and effect necessary paradigm shifts with respect to, access, quality of education, relevance of education, management and governance of institutions and national systems, lifelong education, financial sustainability, innovations and reforms, and international cooperation. It is recognized that these are among the main areas in which interventions are required, and are taking place, as regional educational institutions struggle to remain relevant and dynamic in pursuing the primary development function of higher education in the Caribbean region, namely to unleash and harness the full potential of every citizen for their personal enhancement and fulfillment as well as the collective good of the region as a whole. The governments of the region recognize that the extent to which these goals are achieved will inevitably influence the capacity of the citizens of the region not only to lead productive lives, but also to co-exist in harmony and in their respective societies, thereby contributing to world peace and stability. This has been the basis of the educational reforms which have been taking place throughout the region especially since the 1990s.

Systems-wide Educational Reforms Since the 1990s

It is always worth bearing in mind that the tertiary sector is an integral part of a wider education system of any country and therefore it is not surprising that reforms at the tertiary level more often than not takes place in the context of system wide adjustments. This link has been explicitly acknowledged by the World Bank: [23](#)

Tertiary education plays a key role in supporting basic and secondary education, thereby buttressing the economic externalities produced by these lower levels. Improved tertiary education is necessary for sustainable progress in basic education. The supply of qualified teachers and school leaders, capacity for curriculum design, research on teaching and learning, economic analysis and management — these and many more components of basic education reform are hampered by weak tertiary education systems. A comprehensive approach to the development of the education sector is required,

along with a balanced distribution of budgetary resources to ensure that countries invest appropriately in tertiary education.... When looking at the public benefits of tertiary education, it is important to note the existence of joint-product effects linked to the complementarity between tertiary education and the lower levels of education....

In the English-speaking Caribbean the changes now occurring in the tertiary sector are being undertaken in the context of reforms throughout all levels of the various national education systems, even though the governments have adopted different approaches to these reforms.²⁴ Some countries including Barbados, the Bahamas, Trinidad and Tobago, and the countries of the Organisation of Eastern Caribbean States (OECS), namely, Antigua and Barbuda, Montserrat, St Kitts and Nevis, Dominica, St Lucia, and St Vincent and the Grenadines have developed comprehensive reforms strategies and plans emanating out of the consultations of National Commissions, National Task Force or Working Groups. Other countries such as Belize, Guyana, Jamaica and the Turks and Caicos Islands have opted for a more project-driven approach involving specific interventions directed at particular aspects or levels of their education system, but nevertheless undertaking widespread consultations. In spite of differing approaches to the process of reform it is still possible to identify a core set of themes and issues around which the reforms have been centred. These include:²⁵

- Improving the quality of primary education
- Modernizing the schools and the classrooms through wider use of technology
- Rationalizing secondary education through curriculum reform, restructuring admission and promotion procedures, and greater career guidance
- Expanding tertiary education, including the use of the distance education modality, and linking this level of education more closely to the labour force demands, especially in the priority economic sectors such as tourism and hospitality services, financial services, light manufacturing, and agro-industry
- Increasing and improving foreign language teaching at the secondary and tertiary levels and linking these to the global market place and tourism
- Improving the status, salary, and training of teachers
- Restructuring the financing of education to increase cost effectiveness and including cost recovery, cost sharing, and special taxes to meet educational expenditure
- Introducing various value-oriented projects and materials to influence character formation, promote conflict resolution, and influence the development of wholesome and positive attitudes
- Improving the management of schools through the greater involvement of communities and parents and more accountability measures for schools and teachers
- Promoting greater partnerships among communities, the private sector, non-governmental organizations, and the State in the support and delivery of public schooling

The effectiveness and outcomes of these reforms have been mixed but Errol Miller has observed the following about them:²⁶

When the reforms of the 1990s are compared with those of the independence period, one glaring point emerges. In some countries, for example Barbados and The Bahamas, the two sets of reforms constitute a continuous, almost evolutionary, progression. The 1990 reforms are an evolutionary and incremental step built upon the previous reforms. This conveys a sense of stability and predictability and the ability to plan long term. In some countries, for example Jamaica and Guyana, some of the reforms represent reversals of previous reforms. Free secondary and tertiary education have been replaced by cost sharing and user fees. This gives the impression of stops and starts in the sequence of educational change, and conveys a sense of instability and uncertainty that harbors short-term commitment.

These observations from Miller seem to add credence to the findings of the World Bank that "comprehensive reforms can be more effective than piecemeal ones" and likely to bear more fruits when interventions are integrated into the broad reform programme based on a global change.²⁷ However it should also be borne in mind that "the preference for comprehensiveness does not mean that all aspects of a reform should be packed into a single operation [since] sequencing provides the tools for responding to and adjusting to evolving challenges."²⁸

Regional bodies including CARICOM have also sought to influence the reforms taking place in the region through their own investigations, consultations, conferences and Task Force. Among these initiatives were the Regional Strategy for Technical and Vocational Education and Training emanating out of CARICOM in 1990. Other regional and international organizations including the Caribbean Development Bank (CDB), the Inter-American Development Bank (IADB), the World Bank, and UNESCO have also been helping to support and influence the education reform processes which have been taking place in the region.

Reforms and the Question of Democratizing Access

As previously noted, the overall participation rates in tertiary education in the Caribbean are quite low in comparison to many other countries, especially with Latin America, the East Asian countries and the OECD and other developed countries. These contrasting enrollment situations are symptomatic of a wide and increasingly widening gap between the developed and developing world. For example, whereas in 1980 the tertiary enrollment rate in the USA was around 55 per cent, the average for developing countries was 5 per cent, and by 1995 the respective rates had moved to 81 per cent for the USA but only a mere 9 per cent for developing countries.²⁹ The disturbingly low level of tertiary enrollment in the Caribbean has been for several years a major concern of Caribbean policy makers and regional institutions including the Caribbean Community (CARICOM). Secretary General of CARICOM, Edwin Carrington explains why and what that body proposed by way of solutions:

Not surprisingly, there is ongoing debate throughout the Region, not so much about the principle of economic integration, but about the actual strategies for achieving a viable regional system which would ensure that the expectations of specific countries, communities and various groups, including youth and women, would materialize within a realistic time frame and that requisite benefits would accrue to them. Thus, when our Heads of Government met in Montego Bay [Jamaica] in 1997 and outlined a HRD Strategy for the Region, it was in full recognition of the fact that in order for the countries of the Caribbean to achieve the necessary competitive advantage, a new approach had to be developed. At that time, they were particularly concerned that tertiary level enrolment at under 6 per cent of the adult population in the Caribbean was too low to sustain our development objective. Our 6 per cent level paled in comparison with the over 12 per cent in Latin America, 15 percent in South East Asia and over 20 per cent in Europe and North America. A target of 15 percent by the year 2005 was agreed on to be set for the Region, and at least one country set a national target of 20 per cent by that date.³⁰

This recognition of the inadequacy of the levels of participation in tertiary education in the context of the region's developmental needs, and the changes taking place in the labour market as a result of globalisation provided the context for a number of education reform initiatives which are now being developed in the region. But broadening access is not merely or simply a question providing more access to young people graduating from the secondary schools. Throughout the region, and indeed world wide, a new type of student has emerged reflecting the changing characteristics of the demand for tertiary education. The UWI's current strategic plan has identified the following as among the changing characteristics of the demand for tertiary education in the region:

- A substantial and growing proportion of applicants are young adults in their mid-twenties to early thirties rather than newly graduated sixth formers
- Many prospective students are prepared to trade the benefits of face-to-face programme delivery for accessibility and convenience
- Prospective students are firm in their expectations that programme content bears direct relevance to vocational or career paths
- The students expect that digital communications and learning technologies are used by higher education institutions to create a facilitatory learning environment and enhance their educational experience
- Competing higher education providers excel with respect to the efficiency of their delivery systems; and
- Students actively seek value for their educational investments and are impatient with administrative inefficiencies.

The growth of these characteristics among the student population in tertiary institutions has in fact prompted changes in the admissions policies of the UWI. The UWI has now recognized that more mature students are taking up the challenge of pursuing tertiary education but often many do not have the necessary academic prerequisites to make a successful application for entry into the university's programmes. As a result the Board of Undergraduate Studies which has responsibility for all undergraduate matters, including admissions, recently revised the regulations making it easier for mature students to enter the University's programmes.³¹ Mature students are now defined as persons over the age of 21 who do not have the traditional academic entry requirements. However, the entry of more mature students has created additional challenges for the University in that these students tend to be more discriminating, not easily satisfied with the quality of teaching and learning, and many are stressed as a result of family and other commitments. These shifts all reflect the transition to learning societies in the region, and the corresponding emphasis on life-long learning.

Lifelong Learning

Lifelong learning is now a present reality as Caribbean societies seek to enhance national development and prepare their citizens to deal with the challenges and opportunities of the global economy. Today, individuals and institutions are forced to accept that knowledge and skills acquired may quickly become obsolete, and thus there is a need for continual retraining and re-educating of citizens not only to deal with the world of work but also to be able to function and participate in rapidly changing societies. Not only is the distinction between initial and continuing education becoming blurred but even more fundamental changes are occurring which place more emphasis on learning how to learn. The World Bank explains: [32](#)

The lifelong-learning approach stresses the primacy of the learner. Tertiary education institutions will have to organize themselves to accommodate the learning and training needs of a more diverse clientele: working students, mature students, stay-at-home students, traveling students, part-time students, day students, night students, weekend students, and so on. New patterns of demand are emerging whereby learners attend several institutions or programs in parallel or sequentially, thus taking the initiative to define their own skill profiles on the labor market. Another important consequence of the acceleration of scientific and technological progress is the diminished emphasis on remembering countless facts and basic data and the growing importance of methodological knowledge and analytical skills - the skills needed for learning to think and to analyze information autonomously. Today, in a number of scientific disciplines, elements of factual knowledge taught in the first year of study may become obsolete before graduation. The learning process now needs to be increasingly based on the capacity to find and access knowledge and to apply it in problem solving. Learning to learn, learning to transform information into new knowledge, and learning to translate new knowledge into applications become more important than memorizing specific information. In this new paradigm, primacy is given to analytical skills; that is, to the ability to seek and find information, crystallize issues, formulate testable hypotheses, marshal and evaluate evidence, and solve problems. The new competencies that employers value in the knowledge economy have to do with oral and written communications, teamwork, peer teaching, creativity, envisioning skills, resourcefulness, and the ability to adjust to change.

The emergence of the various private tertiary training and educational institutions in most Caribbean countries very much reflects the requirements of the learning society in the twenty-first century. Likewise there are over seventy foreign-based educational institutions providing access to tertiary level programmes in the English-speaking Caribbean.

However, in the context of Montserrat and the other OECS countries the School of Continuing Studies (SCS) of the University of the West Indies still represents one of the more effective public institutions preparing regional citizens for the new realities of the economy and society in the region. Headquartered on the Mona campus of the UWI in Jamaica the SCS has centres or extra-mural departments in all the countries which contribute to the university. The mission of the School of Continuing Studies is to provide opportunities for lifelong learning through a variety of high quality academic, technical and vocational programmes designed to contribute to the social, cultural and economic development of the people of the Caribbean region. During the academic year 2000-2001 over 19,000 students were enrolled in programmes being offered by the SCS across the region. Increasingly, the SCS's programmes reflect a recognition that equally emphasis must be placed on creating opportunities for citizens to access tertiary education and on adult education utilizing formal, informal, and non-formal teaching-learning modalities. Its function therefore has been redefined to meet the demands of lifelong learning, perhaps signaling that its name should also be changed to the School for Lifelong Learning, a more inclusive role. Indeed, nowhere is its new mandate more pressing, complex and difficult than in Montserrat, a society which has undergone profound changes as a result of the ongoing volcanic crisis.

Meeting the Specific Educational & Training Needs of Montserrat

The human resources capital of Montserrat has undergone a severe blow as a direct result of volcanic activity, which commenced in July 1995. During escalated activity in mid-1998, the population of Montserrat saw an approximate seventy-four percent (74%) reduction from 10,324 to 2,726 individuals. This significant decrease in human capital, translated into loss of core skills and institutional memory, both in the public and private sectors. This has obviously had a profoundly negative impact on the character and pace of economic and social development of Montserrat.

In 2002, some seven years after the commencement of volcanic activity, the focus has shifted from an emergency response mode to the redevelopment of a small-island state in a sustainable way to respond to the challenges of

global competitiveness. The vision statement of Montserrat developed as part of Montserrat's strategic and national monitoring framework reads:

The rebuilding of a healthy and wholesome Montserrat, founded upon a thriving modern economy with a friendly, vibrant community in which all of our people through enterprise and initiative can fulfil their hopes in a truly democratic and God fearing society.

Promoting the retention of the present population and encouraging the return of Montserratians from overseas was identified as integral to the realization of this vision. To ensure that the peoples of Montserrat are equipped with the skills and aptitude for the rebuilding and development process dictate an increased access to and improvement of the quality of formal and informal education opportunities.

Within the past three years, significant resources have been allocated to the determination of the educational and training requirements of Montserrat. The following surveys were conducted to confirm the main gaps to be addressed in competencies and skills to enhance job performance and effectiveness of the human resources on Montserrat:

- Government of Montserrat Training Needs Survey, May 2000;
- Ministry of Education Needs Assessment, 2001;
- Caribbean Centre for Development Administration (CARICAD) initiated Training and Human Resource Development Needs Assessment for the Caribbean Public Sector, 2002.

A recent study report (May 2002) by Dr Patricia Ellis stressed the importance of introducing a new concept and to create an image of a Community College that is different from the traditional, stereotype of what such an institution should be. The following key issues, among others were identified:

- the small population and the need to retain and increase it;
- expansion of the human resource base to provide a pool of resources on which to anchor the development process;
- retooling and retraining the workforce so that it can meet local needs and respond to the changing demands of the global marketplace;
- revitalization of the private sector;
- promoting and facilitating self-reliance.

Because of the current nature of Montserrat's situation, the public sector must in a number of aspects assume the role of the engine of growth due to the fragile state of the private sector. In the modern context of change and attempts to build a dynamic and responsive public service delivery system, continuous learning and improvement is required. The training and development needs identified for the Public Service, include:

- Quality Customer Service
- Communication Skills
- Information Technology Skills
- Change Management
- Supervisory Management
- Leadership
- Negotiation Skills
- Research and Statistical Skills
- Human Resource and Financial Management Skills
- Project Management
- Strategic Planning
- Policy Research and Analysis

In compiling the national training priority areas over the period 2000-2002, a number of key areas (ranging from the certificate to degree level) were identified for urgent attention. These included:

- Architecture
- Electrical and Mechanical Engineering
- Tourism
- Agricultural Science
- Information Technology
- Arts (French, Spanish, History and Geography)
- Social Work

In this regard, a key strategy to address the educational and training needs of Montserrat in a cost-effective and efficient manner will necessitate that the UWI School of Continuing Studies, the Government of Montserrat's Training Division and the proposed Montserrat Community College function cohesively to make a reality the desired developmental goals. The peculiar circumstances and urgent requirements signal the need for rationalization of post-secondary human resource development provisions to optimize the use of scarce human, physical and financial resources. In this way areas of commonality are taken into account, ensuring greater access to and wider offerings of tertiary level training opportunities.

The achievement of these objectives also requires close collaboration between the different levels of the educational system in Montserrat, as well as, more effective interface and cooperation with regional and international training and educational institutions. These imperatives are in fact adequately recognized in the Montserrat Education Development Plan for 2002-2007, as is reflected in the following extract:

The Ministry of Education is committed to making adequate provision for the intellectual, creative and emotional development of all of the citizens of Montserrat. It will do this by enabling its people to acquire basic academic, technical and social skills that will contribute to personal and national development.

The Ministry of Education will strive through the models of its staff, their enlightened modes of instruction and the content of curricula, to inculcate social values such as self-discipline, integrity, tolerance and communal responsibility.

The Ministry of Education will endeavour to build capabilities for self-directed and lifelong learning in citizens of all ages and abilities, to enable them to adjust to, and benefit from the challenges of constantly changing knowledge and other circumstances in the local and global environment.

Conclusion

The coalescing of the global trends outlined in this paper clearly provide a powerful rationale for educational systems throughout the region to make the necessary paradigm shifts to lifelong learning and the creation of learning societies. It is true that the ongoing volcanic crisis in Montserrat may have compounded and perhaps confused the imperatives of change in that island. However, this fact in itself provides even more compelling reasons why a concerted effort needs to be made to ensure that whatever policies and plans are developed have at their core an unswerving commitment to relevance and quality. It is these two factors especially which will to a large extent determine the success or failure of the new national developmental thrust in Montserrat, and its sustainability as a viable community.

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