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Editors Letter

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Rethinking and designing lifelong learning policy

A short essay

Iris Merkelbach *

Abstract

To address human participation in an era of digitalization and AI, policy makers need to redesign their concept of lifelong learning. However, to put the concept lifelong learning successfully into practice, three policies should be implemented: the school curriculum needs to include informal community-based learning activities, policies targeting the private sector should enhance flexibility for formal educational and vocational learning activities, and lifelong learning needs to be funded by means of a combined private-public saving scheme.

Keywords: Lifelong learning, digitalization, AI, employment, non-employment

1 Introduction

The concept of lifelong learning has drawn to the attention of scholars and policy makers for decades. However, up until recent technological advancements, there was no incentive to pursue lifelong learning. Digitalization and the development of artificial

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intelligence (AI) have provided a reason for urging policy makers to turn the idea of lifelong learning into practice. According to Frey and Osborne, approximately 47 percent of total US employment is exposed to automation (2013). Contrary to this high estimate, another group of scholars casted a modest prediction model for future employment, estimating 18.2 percent of jobs to be at high risk of automation (?). Which forecasting model might eventually turn out to be society's reality remains to be seen, but the undeniable fast pace of technological development begs for an answer on looking within and beyond the labor market. Lifelong learning could be one of the answers addressing human participation in the age of digitalization and AI, but how do policy makers motivate individuals and ensure sufficient funding ? Both issues, which will be discussed here, need to be considered, as they prevent the implementation of lifelong learning.

The concept of lifelong learning

Before turning to the stimulation of individual participation and creation of funding models for lifelong learning, the definition of lifelong learning needs to be made clear first. Lifelong learning has been described by the British Economic and Social Research Council as:

“in which all citizens acquire a high quality general education, appropriate vocational training and a job ... while continuing to participate in education and training throughout their lives.... Citizens of a learning society would ... be able to engage in critical dialogue and action to improve the quality of life of the whole community.” (Gorard and Rees, 2002)

Policy makers define lifelong learning not merely in terms of meeting skill-relevance demands of the job market, their definition relates to good citizenship and being a valuable member to society as well. Lifelong learning thus encompasses economic and social value. Since newly acquired skills serve a broader purpose, lifelong learning can be tied to non-economic and voluntary projects. Given the forecasting models mentioned earlier on, a significant part of the labor force will be replaced. While job replacement by automation is considered part of the economic growth cycle, it is predicted that digitalization and AI will have a permanent effect on job replacement. Among several reasons, current technological development causes stagnant wages and divergence between productivity growth and wage growth (Virgillito, 2016). As such, lifelong learning having a broader purpose, serves the interest of both employed and non-employed population. However, the definition falls short on the informal aspect

of learning or, phrased precisely, learning opportunities related to community-based activities (Gorard and Rees, 2002). Engaging permanently non-employed citizens regularly throughout their lives in formal educational forms such as university or vocational training is highly unlikely. Therefore, the definition of what comprises lifelong learning should be revised in order to incorporate the scenario of non-employability in an era of digitalization and AI: *‘having all citizens involved in either informal community-based learning activities or formal educational and vocational learning activities throughout their lives in order to be a productive member of society and/or a valuable participant in the economy.’*

Within the essay, the revised definition of lifelong learning will be employed, as a way to refer to both employed and non-employed citizens.

Stimulating individual participation in lifelong learning

The inclusion of both informal and formal learning activities requires different policy strategies. So far, educational policies have been focusing on the preparation for a career, while neglecting community-based learning activities. As a result, positive experiences of individuals at school are limited to career opportunities. Based on current numbers, unpaid work is already an important factor in the economy. Unpaid work for women in the developing as well as the industrial world is estimated to constitute two-thirds of their total work time, whereas it accounts for approximately one-third of total work time for men. Technological advancements will most likely alter the balance between paid and unpaid work (ILO, 2017; Swiebel, 1999). Although some policy makers have been concerned with citizens helping themselves as a way of mobilizing civil society (Usher and Edwards, 2007), prospects of employability remain important in the debate of lifelong learning (Hyde and Phillipson, 2014). A shift in mindset is needed, as educational policies should include informal learning opportunities into their curriculum. If a significant portion of the population will permanently remain unemployed, the positive experience of community-learning activities starting at school will become just as relevant as the preparation for and continuation of a career in the light of lifelong learning. Positive informal learning experiences will stimulate individuals to develop their capabilities outside a work-context. For formal learning activities, there exist multiple options, but effective participation of employed individuals in formal lifelong learning depends on the organizational structure of a company. Top-down organizations or organizations that insufficiently take into account work and personal needs of employees tend to see employees less motivated to participate in lifelong learning (Keeling, Jones, Botterill, and Gray, 2006). Of equal importance are flexible

learning policies and learning policies incorporating long-term leave or near retirement (ibid). Policy makers should therefore design policies aimed at the private sector which increase the adoption of a flexible approach among companies towards lifelong learning. For instance, a policy measure could include a paid maximum of three weeks devoted to formal learning each year. Ensuring income during formal learning opportunities could function as an incentive for lifelong learning participation among employees.

Funding lifelong learning

To support informal and formal lifelong learning, a saving scheme should be adopted by government, as regular investments necessary for lifelong learning cannot be merely funded by subsidies. A lesson can be drawn in this respect from pension schemes. Many OECD countries employ a combination of private and public funding. In these countries, private-pension contributions have been made mandatory for employed individuals as a means of supplementing their public pension scheme (?). The advantage of such a system is that it decreases public pension entitlement rates by requiring individuals to provide partially for their own retirement income. At the same time, as part of the retirement savings operate on a public scheme, individuals do not bear the entire risk of saving for old age (Queisser, Whitehouse and Whiteford, 2007). A public saving scheme for lifelong learning faces two challenges. First, public pension schemes have already been under pressure caused by the unsustainability of the public fund's saving mechanism, which means that there might be a lack of willingness to create an additional saving scheme for lifelong learning. Second, a significant share of the working population is threatened to be replaced by digitalization and AI, which will put an additional pressure on public scheme mechanisms for lifelong learning. Nevertheless, a combined public-private funding scheme for lifelong learning would be a reasonable solution to address both concerns, given the perks explained earlier on. Public resistance primarily depends on whether the financial burden is perceived to be properly distributed among the employed population vis-à-vis individuals carrying the risk. Careful justification and explanation is vital in communicating the saving scheme to the public. Perceived fairness though, might conflict with the second concern. In terms of the future scenario of the workforce and the fund's sustainability, policy makers most likely need to tilt the combined public-private scheme towards private savings. A possible negative effect of a combined public-private saving scheme tilted towards private savings would be that it could cause inequality between employed and non-employed individuals, as non-employed individuals cannot rely on private funding schemes (Gruber, 2013). As such, policy makers will need to make a trade-off between

publicly perceived fair proportionality and sustainability of the saving scheme.

Conclusions

If the presented policy suggestions and the funding model would be incorporated in the policy design, lifelong learning could turn out to be an effective tool for addressing human participation in the era of digitalization and AI. However, crucial for successful implementation is the definition of lifelong learning, which is not merely a matter of policy redesign, but also requires a societal shift of attitude towards unpaid work. Academics and policy makers are front runners in this regard, and should prepare society for a future of lifelong learning.

Comparative Analysis of the trade performance of the Southern African Development Community & the Pacific Alliance

Tim Höflinger *

Abstract

This article assesses and compares the performance of the Pacific Alliance and the SADC in trade. The analytical framework encompasses four performance criteria respectively evaluated through intra-regional trade shares, FDI, trade costs and institutional design. The analysis found that the SADC is effective in fostering intra-regional trade but has a legitimacy problem primarily in regard to its donor dependence. The PA lacks effectiveness in increasing intra-regional trade, but is successful in promoting itself as a trade-bloc to the external-market and attracting FDI. The SADC's FDI-inflow appears to be highly volatile to commodity price fluctuations. In terms of trade-efficiency, time and monetary trade barriers in the SADC are significantly higher compared to the PA, signaling a lack of efficiency in decreasing these input costs in relation to the output. One ramification of these findings is that the SADC is effective in trade integration but at too high costs and that the PA is more focused on extra-regional trade as a solidified bloc.

Keywords: SADC, Pacific Alliance, trade, intra-regional trade, FDI, trade costs

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1 Introduction

In the following sections, this paper will assess and compare the performance of the Southern African Development Community (SADC) and the Pacific Alliance (PA) in the domain of trade. The subsequent section will elaborate on the analytical framework, followed by the main analysis, which results and ramifications will finally be discussed in a critical summary.

Initially, it is useful to outline some general differences and similarities of the two regional integration organizations (RIO). While the SADC's establishment dates back to 1992, the PA is a relatively new organization founded in 2011. The alliance was created upon already existing trade agreements among the four states, as a supplementation-tool. The SADC on the other hand, emerged out of the SADCC, which was established in 1980 in order to construct a counterpoint to apartheid South Africa (?). The SADC, as the largest RIO in South Africa, comprises 15 South African member states, while the PA's four members are spread across North- and South-America. The most notable dissimilarity however, is the divergence in regional economic conditions and output. The SADC accumulated a total GDP of 630.1 billion US\$ in 2015, in the same year the smaller PA generated a total GDP of 1.9 trillion US\$.

Conversely, there are also resemblances between the two RIO's such as in population size (PA: 224 million; SADC: 277 million) and the economic growth rates (PA: 2.6%; SADC: 2.2% (2015)). The organizational objective-setting of both RIOs for trade policy are quite typical. The PA seeks to "Build...an area of deep economic integration" and "Promote the growth, development and competitiveness of the Parties' economies, aiming at achieving greater welfare...". Similarly, the SADC's objectives include aspects like "Achieve development and economic growth, alleviate poverty..." and "Promote self-sustaining development on the basis of collective self-reliance...".

The PA's key competencies in trade are trade liberalization and the coordination of trade promotion activities. The key accomplishment of the PA is the in 2013 agreed on eradication of 92% of the tariffs on intra-regional goods trade and the commitment to total elimination by 2020. A further noticeable achievement is the integration of the member states stock exchanges to a Latin-American Integrated Market. The PA states are outperforming other Latin-American countries in most economic indicators such as unemployment rate, GDP growth and level of investment. This fact, the integration pace and the outwards-orientated focus of the Alliance, might explain the high number of observer states that it has attracted. The mandate of the SADC in the domain of trade is the financial liberalization and coordination of regional trade. The most noteworthy achievements of the SADC in the trade domain are the formation of a free

trade area in 2008 and the maximum tariff liberalization in 2012. A recent increase in Foreign Direct Investment (FDI) and intra-regional trade was attributed to these efforts of the RIO.

2 Methodology

In order to analyze the performance of the selected regional organizations, I use Jörgensen's performance-criteria: relevance, effectiveness, efficiency/financial viability and additionally legitimacy/accountability. Relevance is measured in the amount of FDI-inflow that the respective region has attracted. This indicator reflects the valuation by extra-regional stakeholders, in particular companies, for a region in terms of investment and trade potential. An increased FDI-inflow can indicate the recognition and support by the international market of a regional organization as a relevant and functioning economic and trade platform. The Data was taken from UNCTAD. As a limitation, it must be noted that the FDI indicator only takes into account equity flows. Effectiveness is measured in intra-regional trade shares in export and import. This indicator provides a good insight in the achievement of the typical objectives formulated by regional organizations when it comes to economic integration such as an increased circulation of intra-regional goods, less trade barriers and an increased economic interdependence. Since this indicator is captured as a percentage of the total import/exports of the region, it takes into account the total trade-volume with the world as a control variable making the two RIOs with different economic development-levels more comparable. A limitation of this indicator is the availability of accurate trade data, in particular when it comes to the SADC. The indicator values for the PA were self-calculated by using raw-data from the UN-COMTRADE database (Appendix-1). The values for the SADC were taken from the official SADC Statistics Yearbook.

For the assessment of organizational legitimacy and accountability, this paper will examine the respective institutional designs descriptively. Hereby, the focus is primarily on the identification and evaluation of input/control legitimacy in the form of dispute-settlement bodies, audit units, donor dependence and citizen representation/parliamentarianism. These input legitimacy components are adopted from van der Vleuten's analytic framework.

For financial viability/efficiency, the paper looks at the objective barriers of trade (trade costs) and its relation to total regional trade (output). Thereby the focus is on time and costs accompanying the export of goods as determinants of trade-efficiency,

components which are interlinked with trade-integration performance overall. The Data is taken from the World Bank's DOING BUSINESS project. The analytical focus is here on whether the RIO was able to improve efficiency by reducing trade costs on the regional trade process level. A limitation is the non-inclusion of further trade resistance factors such as population and distance (requires gravity-model estimation).

3 Conclusions

If one is required to strictly sum up the performance according to the discussed criteria I would conclude the following points: The SADC is comparatively effective in fostering intra-regional trade but has a legitimacy problem primarily in regard to its donor-dependence. Such a problem cannot be identified in the PA, but the Alliance lacks effectiveness in increasing intra-regional trade. The SADCs external-relevance in terms of FDI is on the gradual rise but from an instable nature due to the high dependency on commodities. While the PA is successful in promoting itself as a trade bloc to the external-market, attracting FDI and attention in the form of observer states. In terms of trade- efficiency, time and monetary trade barriers in the SADC are significantly higher compared to the PA, signaling a lack of efficiency in decreasing these input costs in relation to the output.

But clearly such a rather rigorous performance judgment does not take into account the full context and all the influencing factors. Although measuring certain outcomes against certain standards and objectives is helpful to capture progress, one can mostly not make an objective and definitive judgment. The reality is more nuanced and contextual, as performance is a dependent variable impacted by numerous known and hidden factors. For example, it is possible that the SADC member economies would have behaved similarly even without the establishment of the RIO but simply as the effect of their demographic development and globalization.

Moreover, to which degree can one really refer to better performance after a comparative-analysis, considering e.g. the large difference in economic development of the SADC and the PA.? What is considered weak in terms of progress in the PA might be considered strong in the SADC and vice versa. Just because the PA is not boosting intra-regional trade one cannot argue that this RIO is failing, as in the regional context intra-regional trade is indeed above the LA level. This also reveals the weakness of the benchmarking against global standards, as the world is not characterized by one but a multitude of varying levels of development velocities.

RIO performance is not static, like the organizations activities it constantly operates

in a dynamic environment interacting with several factors. Looking only at certain numbers and selecting certain cases can never fully reduce the bias and endogeneity, implying that such a performance assessment will always be subjective. However, it is de facto the only way to form some kind of opinion about the progress and usefulness of RIOs. At least it can capture certain progress tendencies and insights of organizational activities, helpful to derive policy recommendations.

Evolution of hibernation strategies

Sleep more or less? That's the question.

David Searcher *

University of Sleepingbeauty

1 Introduction

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*Corresponding author: dsearcher@googleing.net.

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3 Torpor as adaptation to global warming

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