

Draft Annotated Programme
International Conference
Lifelong Learning as an Affordable Investment
6-8 December, 2000
Château Laurier
Ottawa, Canada

Hosted by the Organisation for Economic Co-operation and Development and Canada

Background and Purpose of the Conference

1. In contrast to other far-reaching reforms and new initiatives in learning, the mandate adopted by OECD Education Ministers in 1996 to make lifelong learning for all a reality, poses a particularly complex resource challenge because it changes so many parameters at once. It implies quantitative expansion of learning opportunities; qualitative changes in the content of existing learning activities; qualitatively and quantitatively different learning activities and new settings, and changes in the timing of learning activities in the lifecycle of individuals. These developments imply, in turn, a strong likelihood of changes in the costs of providing and participating in education, training and learning activities, and increases in the total outlays by society for such activities. Constraints on and competition for public resources combined with the presence of substantial private returns to certain aspects of lifelong learning imply a need to increase the private share of the overall finance burden.

2. To implement strategies for lifelong learning, policy-makers and social partners need to address three resource questions:

- What resources are likely to be required in order to make lifelong learning for all a reality?
- Under what conditions can the mandate be made more affordable to society?
- What is the role of public policy in helping to meet those conditions?

3. The purpose of the conference is to help structure and guide the policy debate on these three questions. The conference will draw on analyses, findings, and lessons from different components of the Organisation's work on financing lifelong learning, as well as relevant material from the Organisation's thematic reviews on early childhood education and care, transitions from learning to work, and adult learning. Another input will be participation by Member countries to report on recent initiatives and policies. It will take stock of the current debate; identify the areas of policy consensus; and indicate where further data collection, analysis and debate are merited.

4. Results of the conference will serve as input into the meeting of OECD Education Ministers in 2001. They will help provide the basis for a more informed debate by Ministers on how they can address issues related to resources for lifelong learning, and how they can engage finance, labour market, and other policies in order to address resource issues. The Conference results will also feed into the discussions of Employment, Labour and Social Affairs Committee on issues related to human capital investment, as well as to the OECD Growth Project.

5. Participants will include policy-makers responsible for mapping out future strategies and programmes, researchers with insights into progress and results to date, and social partners. In view of the stakes that the social partners have in the provision of lifelong learning, as well as the learning outcomes, BIAC and TUAC will be invited to participate. Given the policy focus of the Conference, two or three ministers will be invited to participate in the final policy debate.

Draft Programme

6 December 2000

19h00

Reception for conference participants

7 December 2000

9h30 - 10h00

1. Welcome and Opening Address

10h00 - 11h30

2. How is lifelong learning transforming the debate over resources for learning?

Panel discussion

The lifelong learning mandate sets the stage for a complex policy debate because the objectives, costs, and responsibilities all are variable. Policy-makers and social partners within countries are taking concrete steps to implement lifelong learning. Though there are differences across countries in elements of their mandate, priorities, and progress in achieving them, there are common directions. It would appear that the resource issues that arise are different from those encountered in the past, with regard to finance of formal education systems. Moreover, there are new issues that arise with regard to informal learning opportunities. The panel will begin with initial interventions from the perspectives of policy-makers engaged in formulating lifelong learning policies, researchers monitoring the implementation of such policies, and social partners who witness the impacts of such policies. Presentations and subsequent discussion will provide initial views on the following points in particular:

What are the most important issues, and what are the new resource issues that arise as countries implement strategies for lifelong learning? How are various actors dealing with them?

What resources are likely to be required in order to make lifelong learning for all a reality?

Under what conditions can the mandate be made affordable to society?

What is the role of public policy in helping to meet those conditions?

11h30 - 11h45

3. Addressing resource issues in the context of existing institutional arrangements

Plenary session introduction to workshops

11h45 - 13h00 Lunch

13h00 - 15h00; 15h30 - 17h30 Workshops
(Participants will have a break from 15h00 - 15h30)

The institutional arrangements for lifelong learning potentially are vast, involving everything from the workplace, to the home, to leisure activities, as well as formal education. Addressing the attendant resource implications risks opening a complex debate because the potential scope of the mandate cuts across existing institutions and divisions of responsibilities. Yet, even if the potential for interactions between different sectors of learning make it difficult to envision the institutional arrangements for lifelong learning in the *long-term*, there is more consensus in the *short-* and *medium-term* as to goals and objectives of existing institutional arrangements and learning settings.

In this part of the programme, participants would divide into four working groups corresponding to four “sectors” in which the lifelong learning mandate has the potential for triggering important changes in: **early childhood; compulsory and upper secondary education; tertiary education; workplace and adult learning**. In each working group participants will address each of the four issues outlined below. Certain issues will be more important in some working groups than in others. In each of the working groups there will be two major presentations by policy-makers, researchers, and/or practitioners, on the importance of each of the issues, and how it has developed. These would be followed by interventions by discussants who have been involved in the OECD thematic reviews or who are otherwise experts in the area. This would be followed by general discussion. The rounds of workshop will run once early in the afternoon, and will run a second time late in the afternoon, thus allowing individuals to participate in two different workshops.

Each of the workshops will address the following four issues:

How does lifelong learning affect past assumptions and practices regarding who pays for learning? Early childhood education and care is publicly financed in part or in whole in some countries. Publicly financed initial education is universally available at least through upper secondary education; at the tertiary level, it is publicly financed in part or whole, depending on the country. Labour market training for the unemployed is publicly financed. Lifelong learning may shift the usual balance between public and private funding of learning. Early childhood education and care is seen increasingly as something that should be universally available in order to ensure better that children begin school ready to learn. How might this affect the public vs. private responsibilities for financing? In a lifelong learning perspective, initial education can be seen as something that should be accessible at anytime over an individual’s life. Can there be publicly financed entitlements to such learning, regardless of age? Lifelong learning occurs in a greater variety of settings than formal education, many of them non-public. What does this imply for who pays? As learning becomes more common for adults, what criteria should be applied in deciding who pays?

How does lifelong learning increase the opportunity for enhancing cost-effectiveness of provision of learning, and increasing its benefits? Lifelong learning implies an increase in the total volume of learning and the financial resources devoted to it. Successful implementation of lifelong learning strategies depends in part on strengthening the incentives for public and private investment in learning, i.e., increasing benefits relative to costs. So far, strategies for lifelong learning, often in tandem with other measures (to improve quality of education outcomes, for example), have had positive effects in this regard. Thus attempts to integrate vocational training and academic studies can improve the quality of upper secondary qualifications, and rationalisation of teaching personnel may reduce unit costs.

What are the most important factors that underlie economic and non-economic costs and benefits of lifelong learning in various sectors (e.g. teachers' salaries in compulsory education, foregone earnings for adults). What approaches show promise for reducing costs (e.g. relaxing barriers to entry of new learning providers, use of ICT), and raising benefits (recognition of informal learning, stronger link between lifelong learning outcomes and wage setting in collective bargaining).

What mechanisms facilitate financing of lifelong learning, either out of future benefits or past earnings of employers and individuals, or out of public resources? Strong incentives to invest in lifelong learning are not enough to stimulate such investments if actors do not have access to financial resources. In finding financial resources it is necessary to address the interdependency between investments made at different points in the lifecycle. There are limits to how practical this is, since much of initial education is publicly supported, and much of subsequent learning is privately supported. But there is potential for progress in rationalising the public and private shares separately. For example, on the public side, consolidation of allocations for different levels of education, and decentralisation of allocation decisions might facilitate re-allocation of resources across different levels of education. On the private side, greater accessibility of loans with income-contingent repayment might make it less risky for young persons as well as adults to borrow capital to finance the costs of tertiary education and further training. For working adults and retired persons who are adverse to financing learning through loans, individual learning accounts might allow them to defer some portion of pre-tax income during high earning years, to pay the costs associated with acquiring new qualifications or pursuing leisure courses during retirement. What is being tried? What are the pros and cons of options being considered?

What mechanisms and processes make it easier to address the resource issues that cut across ministries and the public and private sector? It is difficult to make coherent decisions about resources for lifelong learning because the factors that directly and indirectly affect the incentives and finance for investment in lifelong learning are found in different ministries, and cut across the public and private sector. In addition to decisions concerning the allocation of resources across levels of education (referred to above), they include decisions concerning the allocation of resources for labour market training and other "non-education" policies that involve human resource development. They also include factors as diverse as the tax treatment of expenditure on early childhood education and care, and on adult training; the stance of competition policy regarding barriers to entry of non-traditional education and training providers; telecommunication infrastructure and fees; the capital market disclosure policies regarding human resource development by enterprises; and the treatment in collective bargaining of knowledge and know-how acquired by individuals through lifelong learning. Many of these issues require comprehensive, multidisciplinary approaches to documenting and analysing particular problems, and for communication channels and consultation processes that involve all relevant actors. How are governments and social partners dealing with these difficulties?

8 December 2000

9h00 - 10h30

4. Where are the most urgent resource problems?

Plenary session review of working group results

Chairs of the working groups would present and compare the nature and seriousness of the resource problems that arise with respect to each of the four issues above, and report on remedies.

10h30 - 11h00 Break

11h00 - 12h45

5. Mapping responsibilities, incentives, and enabling mechanisms

Plenary session -- Policy Debate

Selected speakers would present their views on the roles of public authorities, employers, and individuals in addressing the problems that arise in ensuring adequate resources for lifelong learning. This would be followed by reactions from a panel of experts and general discussion.

13h00 - 14h00 Working Lunch

6. Lunch speakers' topic: Messages for Ministers and Member countries