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‘Learners of the workplace unite!’: an empirical examination of the UK trade union learning representative initiative

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ABSTRACT

The statutory rights conferred on trade union learning representatives (ULRs) under the 2002 Employment Act represent a significant development for the British trade union movement. This article presents an initial empirical assessment of the ULR initiative, drawing from original quantitative and qualitative data on ULR activity. Our findings suggest that while ULRs have been successful in promoting and facilitating employee-centred learning opportunities, the development of their role is potentially constrained by their evolving relationships with employers and their insertion into broader trade structures. Nonetheless, there are signs that the initiative has the potential to contribute to the recruitment of new trade union members.

KEY WORDS

learning / trade unions / training and development / union learning representatives

Introduction

The 2002 British Employment Act (Section 43) conferred statutory rights on a new breed of trade union representatives: trade union learning representatives (ULRs).¹ After almost two decades of government hostility and

antipathy this represents a significant gain for the British trade union movement, since the advancement of the learning agenda has been intimately connected to the issue of trade union revitalization. The appeal of learning opportunities and skills acquisition to existing and potential members has been shown to contribute to the organizing agenda, while at the same time facilitating benefits for membership in line with the servicing agenda (see Munro and Rainbird, 2004a). Typically, trade unions have sought to position training and learning issues within a mutual gains framework, in order to promote, and achieve, partnership-based approaches to employment relations, these being central concerns of the TUC's 'new bargaining agenda'. Against this backdrop, the establishment of statutory rights for ULRs could be seen as an endorsement by the state of the pursuit of trade union strategies based more around consensual, 'positive sum', 'occupational interests' than the supposed adversarial approaches of the past (Leisink, 1993; Stuart, 1996).

To date, some 6500 trade unionists have been trained as ULRs, with estimates projecting a network of over 22,000 by 2010 (TUC, 2003a; York Consulting, 2003: 3). Not surprisingly, the expectations of ULRs amongst policy makers are high. ULRs, it is claimed, offer the potential of increased learning opportunities for individual workers, new members for trade unions and improved performance for employers. Thus, according to the ex-TUC General Secretary John Monks:

... legal backing will help unions make even more of a difference to learning at work. Well-trained workers are the workers of the future, and unions stand ready to work with employers to make learning a reality in every workplace in the UK. Learners of the workplace unite! (TUC, 2001: 17 May)

The ex-Minister for Employment Relations, Alan Johnson MP, noted that:

Everyone benefits from the work the representatives do. Workers benefit from increased training opportunities and employers gain through having better trained workers, and as a result higher productivity. (TUC, 2003b: 28 April)

Yet, to the extent that employees and employers may have different needs and interests in relation to learning and training (Rainbird et al., 2003), much will depend on the employment relations context in which ULRs operate, the nature of their engagement with employers and the trade union support structures into which they are inserted. Most significantly, successful ULR activity and the furtherance of partnerships around learning may themselves be dependent on the existence of a broader degree of union strength and independence within specific workplaces (Munro and Rainbird, 2004b).

Against this backdrop, this article presents an initial empirical assessment of the ULR initiative, drawing from original quantitative and qualitative data of ULR activity in the English county of South Yorkshire. The article seeks to contribute to our understanding of ULR activity at three levels: how they aim to advance learning opportunities among and for workers, how they engage (bargain) with employers, and how they connect with and are supported by

broader trade union structures. We begin by outlining how trade union interests in training and learning have developed in recent times, how this has overlapped with British government policy since 1997 and, in terms of ULRs, the specific challenges that they face. The methodological base of the study is then detailed, followed by the formal presentation of our empirical findings. In conclusion, we present four key points. First, it appears that ULRs have been successful in promoting and facilitating learning opportunities. Most importantly, they have been able to advance a learning *agenda* that is largely independent from employer priorities. Second, while there is evidence of an evolving relationship with employers, ULRs face difficulties in extending a learning agenda that is often defined (constrained) by management prerogative. Third, the relationship between ULRs and the broader trade union apparatus is characterized by tensions: tensions that have been thrown into sharp relief by the issue of bargaining, hindering in some instances the development of the potential role of ULRs. Fourth, the ULR initiative has the potential to contribute to trade union revitalization by generating a new cadre of union activists and stimulating interest in trade union membership amongst non-union members within some workplaces.

Trade unions and the learning agenda

While the personal development of members has been a longstanding concern of trade unions, training and learning issues have attained a more strategic position in recent times. This was evident in the early initiatives by the Electrical, Engineering, Telecommunications and Plumbing Union (EETPU) to offer high-tech training as part of its controversial New Realism strategy (Basset, 1986). Developing through the Manufacturing, Science and Finance Union's promotion of training committees in the late 1980s, UNISON's Return to Learn initiative and the TUC's Bargaining for Skills programme (to name just a few), training and learning issues have become central to the articulation of a 'new bargaining agenda' (TUC, 1991). These developments have been widely considered and need no detailed rehearsal here (see, for example, Claydon and Green, 1994; Dundon and Eva, 1998; Heyes and Stuart, 1998; Rainbird, 1990, 2005; Stuart, 1996), beyond noting two key points. First, the promotion of training matters became an increasing bargaining priority for trade unions at the workplace following their exclusion from the institutions of policy formation with regard to skill formation by successive Conservative governments (Munro and Rainbird, 2004b; Rainbird, 1990). Second, training (as an integrative concern) was seen to have a broader conceptual and ideological significance that could be advanced on the basis of more co-operative relations (in partnership) with employers. In other words, the promotion of training has often been predicated on its perceived positive sum characteristics: employees get to receive training opportunities, employers benefit in terms of increased flexibility and performance, and successful union involvement makes them

more attractive to current and potential members. While it has been noted that the consensual characteristics of training and learning are often overstated (Stuart, 1996; Winterton and Winterton, 1994), a point we return to below, there is nonetheless a wide body of evidence to suggest that trade union involvement (and presence) can impact positively on training outcomes (see Arulampalam and Booth, 1998; Green et al., 1995; Heyes and Stuart, 1998; Rainbird et al., 2003). Even so, there is little evidence that trade unions have been able to introduce the issue of learning onto the bargaining agenda (Claydon and Green, 1994), and formal collective agreements relating to training and learning remain uncommon (Dundon and Eva, 1998; Winterton, 2001). Against this backdrop, the recent statutory backing for a trade union role, by a government that is generally more sympathetic to the ethos of lifelong learning, may represent an important turning point.

The 'New' Labour government, elected in 1997, signalled a wide-ranging commitment to the lifelong learning agenda. Amongst other initiatives, it established: the National Advisory Group for Continuing Education and Lifelong Learning (NAGCELL), to advise on widening participation in learning (Fryer, 1997); the Skills Task Force (STF), which had a remit to develop a national agenda for skills (DfEE, 2000); and, most recently, the Skills Alliance.² Unlike their Conservative predecessors, the Labour government has been open to the role of trade unions in skill formation and has sought to involve them within the policy arena. Indeed, it has gone so far as to state that it regards learning as 'a natural issue for partnership in the workplace between employers, employees and their trade union', which 'signals a new and modern role for unions' (DfEE, 1998: 35). These sentiments have been supported by a variety of mechanisms designed to enhance the *capacity* of unions to operationalize the government's lifelong learning objectives. Thus, the Union Learning Fund was established in 1998 with the explicit objective of supporting union-led workplace learning initiatives, and a similar (partnership) fund exists to promote broader partnership-related activities (which could include learning) at the workplace.

More recently, and of significance for this article, statutory rights for ULRs were granted under the terms of the 2002 Employment Act. Originally conceived as learning mentors providing information, advice and guidance about learning, and support to colleagues within the workplace who wished to access learning opportunities, their role has, in some cases, embraced a broader range of functions, including accessing funds to support learning activities, developing workplace learning resources, and negotiating with employers (Cowen et al., 2000). For the government, ULRs are seen as a mechanism to raise employee demand for learning and 'support and complement' employer 'workforce development strategies' (DfEE 2001: 2; Rainbird, 2005); the rights thus confer them with the (reasonable) time, and access to facilities, needed to perform their duties (see the ACAS (2002) code of practice for specific details). The statutory backing for ULRs represents a significant development for British trade unions. As Calveley et al. (2003: 22) note, it 'is the first time since the Health and Safety at Work Act in 1974 that unions have been acknowledged as

having a positive ... role to play in the workplace'. Yet the broader regulatory and policing frameworks governing health and safety are absent with regard to ULRs (Munro and Rainbird, 2004b), and it is notable that the statutory provisions granted to ULRs do not extend to consultation and bargaining rights with regard to learning.

While government sponsored evaluations suggest that ULRs have been successful in terms of promoting learning within the workplace and raising demand for learning among individual employees (Cowen et al., 2000; York Consulting, 2003) the initiative has, to date, been subjected to limited academic scrutiny and few studies have examined the specific implications of the initiative for trade union policy and practice with regard to learning (Forrester and Ross, 2001; Munro and Rainbird, 2003, 2004b and Smith, 2003 are notable exceptions). Yet the initiative merits empirical examination because it is situated centre stage within debates around the consensual, positive-sum nature of training and learning and the significance of this for 'new' trade unionism. Thus, despite the benign pronouncements of policy makers that all parties will stand to benefit from the ULR initiative, the reality may be somewhat different. For as Munro and Rainbird (2004b: 3) note, 'the workplace is a problematic site of learning... [R]ather than representing a neutral intervention, training must be viewed in the broader context of the employment relationship'. Within this context, the needs and interests of employees and employer may diverge and be thrown into tension – employers will primarily wish to invest in business-specific provision, whilst employees may be more interested in enhancing their broader employability. To the extent that significant emphasis (particularly by the government) has been placed on how the ULR role can support employers' training and development strategies, this could pose a significant challenge for ULRs. Indeed, Forrester (2001) has cautioned that despite the ULR initiative representing a significant advancement of trade union priorities, this may be undermined by employers able to harness the activities of ULRs in furtherance of business needs. A key issue for consideration, then, is how ULRs will be able to *resolve* the different needs of employers and employees, and promote opportunities that are of prime benefit to employees (Rainbird et al., 2003).³

As a number of commentators argue, much will depend here on the ability of trade unions to retain an independent agenda with respect to learning (Forrester, 2001; Munro and Rainbird, 2004b). This in turn will be conditioned by the extant and emergent relationships forged with management and the broader trade union support structures into which ULRs are inserted. It may well be that by successfully and independently advancing the learning agenda ULRs may generate new forms of union activism (and new union activists), but as Munro and Rainbird (2003) counsel, this potential could also be undermined by tensions between ULRs and existing branch and full-time officials, who may hold different perspectives on the legitimate roles of trade union activists. With these considerations in mind, the remainder of the article presents an initial assessment of how the ULR initiative is unfolding in practice, paying specific consideration to: the extent to which ULRs are promoting the interests and

needs of employees rather than employers, the developing relationship between ULRs and employers, the potential for sustaining the initiative, and the relationship between ULRs and broader trade union structures.

Methodology

Our research draws upon both quantitative and qualitative data. At a quantitative level, we present findings from a questionnaire survey of ULRs. The purpose of the survey was descriptive, rather than explanatory (Saunders et al., 2000), aimed at providing an up-to-date picture of the background, activities and experiences of ULRs. To this end, we enquired about the mechanisms used to promote learning at work, their degree of success in encouraging new learners and facilitating new learning opportunities, the levels of support they were receiving from employers and their trade unions and their future aspirations with regard to the ULR role.

The survey sample was drawn from a database compiled by the Yorkshire and Humberside regional TUC and focused specifically on ULR activity in South Yorkshire. The rationale was that the TUC were running an externally funded project to develop ULR activity in the county and had established an extensive database of all active (and trained) ULRs as part of this. Following an initial piloting exercise and the elimination of erroneous and multiple entries, a postal questionnaire was distributed to all 125 ULRs active during the spring of 2003. A follow-up exercise was targeted at non-respondents two months after the original distribution. In total, we elicited 60 useable responses, representing a very respectable response rate of 48 percent. The distribution of respondents by union is detailed in Appendix 1, and broadly reflects the current composition of the local labour market (see www.yorkshireforward.org.uk). Sixty percent of respondents were from the public sector and 40 percent from the private sector, reflecting recent trends that show that public sector activity is outstripping that in the private sector (TUC, 2004). The composition of respondents was representative of the population, with 58 percent men and 42 percent women.

A variety of qualitative methods were then utilized to gather more detailed information about the themes raised by the survey. Our key concern here was to explore in more depth the key problematics facing ULRs in trying to engage (and bargain) with employers and build and sustain their role within extant trade union structures. Accordingly, some 25 semi-structured interviews were conducted, either face-to-face or by telephone, with ULRs (and one union learning organizer) in the region. These interviews were complemented by a number of more contextual, expert interviews with regional TUC project workers, full-time trade union officials and tutors on TUC sponsored ULR training courses. Two of the researchers also attended such training courses at two established further education colleges in the region, which facilitated numerous informal conversations with ULRs, union officials and tutors. Finally, relevant policy and

trade union documentation was collected, including any learning agreements concluded by ULRs in the region.

Trade union learning representatives in practice

ULR activities

We began by considering the nature of ULR activities and the approaches they adopt to engage potential learners. Our survey findings reveal that the majority of ULRs spend between one and five hours on average per week on their duties, although just over a third claimed to spend no time at all on ULR duties. This finding is broadly consistent with that of earlier research (Cowen et al., 2000; York Consulting, 2003). Table 1 reveals the number of people that had approached our respondents about learning issues. Around half (47 percent) had been approached by between one and five people, with just under a fifth (18 percent) having been approached by more than 15. It was rare for there to have been no activity at all, with just under one in ten reporting that they had been approached by no one. Typically, ULRs were approached by members of their own union, but overtures were also forthcoming from members of other unions and, perhaps of most interest, non-union members. Specifically, 84 percent of respondents reported being approached by members of their own union, with 27 percent approached by members of other unions and 28 percent by non-union members. This finding raises important questions about the nature of the ULR role. There are sound arguments why membership services such as those provided by ULRs should only be available to union members – and some delegates at a TUC course spoke vociferously about excluding 'noners'. Yet many trade unions have recognized that engagement with the learning agenda represents not just a membership service, but also an organizing issue (Munro and Rainbird, 2000). In this context, half of the non-union members that approached ULRs for advice and guidance subsequently joined, or made enquiries about joining a trade union.

Our findings also allow us to extrapolate some general quantitative data in relation to the number of people signposted by the ULRs towards learning

Table 1 Number of people approaching ULRs for advice and guidance about learning

	%
0	9
1–5	47
6–10	24
11–15	2
More than 15	18

opportunities. In total, our respondents reported that 328 people were directed towards learning opportunities, of which 238 subsequently enrolled on a course. Disaggregated across the sample, this suggests that each ULR in our survey directed five people towards learning opportunities, four of whom enrolled on courses. This tells us little, however, about the mechanisms used by ULRs to engage co-workers. It is useful, therefore, to consider just how the ULRs surveyed sought to promote learning, and inform their colleagues about their role.

As Table 2 indicates, a variety of means were used to promote learning, with talking to employees (88%), and the use of posters/notices (70%), and TUC or union publicity material (46%) being the approaches most frequently adopted. The broader support of other ULRs was also common, while just under a third (32%) promoted learning more generally through union meetings. The findings on the means used by ULRs to inform their co-workers about their role within the workplace were very similar. Again, face-to-face communication (85%) was found to be the most popular method utilized. A variety of information sources were accessed by ULRs in order to provide information about learning opportunities. College prospectuses were particularly popular, with a significant number of respondents also utilizing the trade union movement, their personal contacts and library services as sources of information.

It is significant both that traditional methods of direct communication with co-workers are favoured by the ULRs in our sample, and that many ULRs indicated that they had received support from other ULRs in their workplaces. The key finding here, though, is that the majority of our respondents were not reliant upon management support for their activities. Whilst this may be indicative of a lack of employer support for the ULR role per se, it could also be suggestive of ULRs retaining their independence from management in relation to the learning agenda. In this context, the nature of discussions between the ULRs surveyed and their co-workers are illuminating. Our survey findings suggest that such discussions are typically focused on trade union rather than employer priorities in relation to learning. Thus, the acquisition of transferable skills

Table 2 The mechanisms used to promote learning and inform co-workers about the ULR role (%)

	<i>Used to promote learning</i>	<i>Used to inform co-workers about ULR role</i>
Union meetings	32	26
Posters/notices	70	50
TUC or union publicity material	46	35
Talking to employees	88	85
E-mail	12	12
With support from management	18	14
With support from other ULRs	42	31
Other	5	5

(87%), which could be used to enhance personal employability, and broad life-long learning issues (78%) were the main topics of discussion between ULRs and colleagues. Discussions around the acquisition of more immediate work-related skills (70%) and learning for qualifications (58%) were less frequently reported.

Engagement with employers

While our ULRs were not reliant on management support to promote learning or inform colleagues about their role, the broader significance of management endorsement should not be under-estimated. ULRs need some degree of support from management if they are to perform their duties effectively and, in this regard, we found the attitude of management to ULR activity to be generally positive. Approximately 45 percent of our survey respondents reported that management at their place of work were supportive of the ULR role. Significantly, only a little over eight percent reported that management was either unsupportive or obstructive. Less encouragingly, nearly 45 percent of respondents stated that management were indifferent to ULRs, perhaps indicating that the initiative has little resonance with management in some instances, because training and learning remain areas of managerial prerogative. Our research was conducted during the spring of 2003 when statutory rights for ULRs were just being enacted. Table 3 suggests that the majority of employers were complying with these provisions, since three quarters of our survey respondents reported that they were able to take paid time off to undertake their duties. There was, however, less evidence of physical resources being provided by management to support the ULR role.

Despite their lack of statutory bargaining rights, just over a third of respondents reported that they had attempted to negotiate with management over training issues, with the majority reporting positive outcomes arising from this activity. We were able to explore this in more detail through our qualitative research. Some ULRs had been successful in pushing the issue of learning higher up the employer agenda, and had gained informal verbal support from management for their emergent role. In other cases, informal agreements had been reached with employers both in relation to the ULR role, and to time off in relation to this:

Table 3 Facilities provided by management for ULRs (%)

	Yes	No
Office space	37	63
Telephone	34	66
Stationery	15	85
Paid time off work	76	24
Unpaid time off work	10	90

I have negotiated time off work to complete a level 3 Advice and Guidance course, but as yet no proper training policy. (ULR, Amicus)

In some cases, ULRs were able to negotiate time off for their co-workers to engage in learning activities. Such agreements, nevertheless, appear to be bound by managerial prerogative, with time off being conceded on a selective rather than universal basis, or for job specific training activities only:

Some employees have started a course at a local college and time off has been agreed for them, but this has not been accepted for everybody. (ULR, BECTU)

Only vocational learning is to be allowed during working hours if the learners are to be paid as they study. (ULR, BFAWU)

A number of respondents indicated that they sit on steering committees in their capacity as ULRs in order to develop formal policies in relation to training and development, or to revise existing agreements and arrangements:

[We are] currently developing a training policy. A steering group made up of management, the ULRs, the TUC, BECTU and the Chief Exec are developing a training policy within the IR framework. (ULR, BECTU)

A Steering Committee has been set up which has members from XXXX College, GMB Union, XXXX Council Corporate Human Resources, and the chair of the Steering Committee is the Labour Cabinet member for Performance and Personnel. ... Training Agreement is currently undergoing negotiation. (ULR, GMB)

This is perhaps indicative of high-level recognition within some organizations of the constructive contribution that ULRs are able to make with respect to training policy, and indeed, we found at least one case where such negotiations had already resulted in the development of a formal learning agreement. On the one hand, the signature of such agreements can play an important role in framing the role of the ULR at the workplace, as well as clarifying any entitlement and expectations with regard to time off for learning (Munro and Rainbird, 2004b). On the other, it would be erroneous to regard managerial support for such initiatives uncritically, since this may be motivated by the objective of harnessing ULR support for employer objectives in relation to learning and skill formation. Such considerations raise important questions about the extent to which ULR co-operation with management undermines their independence and their ability to deliver employee-centred learning services. For example, upon becoming a UNIFI ULR at a call centre, one respondent explained that local management had attempted to persuade her that she was now part of the management training team.

For others, attempts to negotiate with employers over training and development issues had been less successful. In some instances, this appears to have been the result of employer representatives being indifferent, or in some cases hostile, towards engaging with ULRs. In other instances, employer representatives, though willing to engage with ULRs, were either unwilling to embrace the broader learning agenda which connects training and development with

employability, or were reluctant to bear the costs associated with providing time off for employees to engage in learning activities:

[It's an] uphill struggle. Management argue against manual employees accessing IT courses as these are not a requirement of the job. (ULR, GMB)

[Management have a] completely negative attitude towards members who require time off for study: The employer only wants to know who will compensate them financially. (ULR, Unison)

There appeared to be differences in the attitudes of senior and line managers towards negotiating with ULRs within some organizations. As a ULR from the Fire Brigades Union noted, there was support from senior management but 'some suspicion from immediate superiors'.

In most cases, however, ULRs had not attempted to negotiate with their employers, with there being evidence of poor industrial relations and the continued assertion of managerial prerogatives having undermined the ability of ULRs to approach management within some organizations. Certainly, the tendency of employers to regard training and development issues as an area of managerial prerogative proved to be a barrier to negotiations over training and development:

As far as they [management] are concerned the training we get for our job role is sufficient. (ULR, GMB)

Developing and sustaining the ULR role

The ULR initiative arguably presents an opportunity for the development of a broader approach to skill formation than has recently been in evidence in the UK, because the trade union approach to learning focuses more on the acquisition of generic skills to facilitate employability, rather than on the development of a narrower range of plant or firm specific skills to facilitate job competence. The initiative also places significant emphasis on widening access to learning activities, raising the potential of addressing extant patterns of inequality with respect to participation in workplace learning (see for example Blundell et al., 1999). Significant emphasis has therefore been placed within both the trade union movement and policy-making bodies on sustaining the initiative.

To this end, we sought to explore how ULRs perceived their role developing in the future and the factors most likely to inhibit or sustain it. Typically, ULRs saw their role continuing in a similar vein, with most emphasis being placed upon promoting learning, and the provision of advice and guidance:

[I would like] to help as many people get an education because I never got a helping hand in the past, and really enjoy helping others gain a better education so that they can really do what they want job wise. (ULR, GMB)

It was also clear that ULRs could themselves act as positive role models for potential learners:

[I would like] to try to help people back to learning to try and better themselves because if I can with dyslexia learning difficulties then anyone can if they set their minds to it. (ULR, GMB)

Indeed, more than half our survey respondents reported engaging in further learning since becoming a ULR, with more than a third reporting that they had gained a qualification. More than half those surveyed had also encouraged other people to train as ULRs.

That said, the ability of ULRs actively to promote learning at the workplace may in itself be shaped by the skill profile of the workplace. Thus, a Unison ULR reported that:

Most people in the workplace have already got quite high levels of qualifications, so they are already aware of the importance of learning.

Accordingly, it was suggested that the initiative would be more sustainable if it was specifically focused on employees with low levels of educational attainment. Such an approach would arguably be more likely to facilitate trade union objectives of widening participation in learning, given the evidence that the highly qualified and highly skilled enjoy greater access to workplace learning than their unskilled and unqualified counterparts (Blundell et al., 1999). It would also dovetail with the government's objective of providing the opportunity for all citizens to achieve a Level 2 qualification. There were also attempts being made to target those workers with basic skills needs; who, as Parsons and Bynner (1998) suggest, have considerably less access to workplace-based learning opportunities than workers without such disadvantages.

More generally, our ULRs appeared to be open to extending their role, in terms of: developing on-site learning facilities, monitoring the progression of learners, providing redundancy support, negotiating training policies with employers, and working in partnership with employers. Indeed, there was some interest in developing the ULR role in a more strategic direction, whereby ULRs would work more closely with management and have more influence over training budgets, and the formulation of training and development policies. For such developments to occur, though, greater levels of employer support for ULRs than has currently been reported would undoubtedly be required. It was notable that concerns were often raised about the perceived profile and levels of recognition of the ULR role at the workplace. Thus, one ULR from the Bakers' Union suggested that they currently represented an under-utilized resource:

We need to be recognized in our workplace and the abilities we have to be used.... As general awareness grows, I would like Learner Reps to be accepted and utilized to their full potential. (ULR, BFAWU)

Given our earlier findings in relation to employer attitudes towards, and support for the ULR role, it is perhaps unsurprising that some ULRs suggested that a greater level of employer recognition and support would help sustain their activities:

[I would like to see the role of the Learning Representative to develop with] more support and encouragement from the employer. (ULR, FBU)

More specifically, and reflecting on-going policy debates, it was suggested that employers could support ULRs by granting time off work for learning to employees, although it was recognized that such a development would require statutory provision:

I would like our management to recognize the benefits of learning and accept that they have a responsibility to allow paid time off for all. (ULR, BECTU)

Government legislation is required, otherwise we will all have to become Learner Reps in order to attend courses. (ULR, Unison)

Lack of employee awareness of the trade union learning agenda, and of the ULR role was also apparent, with some suggesting that levels of awareness needed to be raised if the initiative was to thrive. This appeared to be a particularly pertinent consideration within organizations where training and development opportunities were already provided by the employer, since here, employees were more likely to approach the employer than their ULR about their training and development needs. Such issues arguably need to be considered within wider discussions about the relationship between ULRs and the Human Resource Department within organizations where both functions exist, and the specific forms of provision that ULRs promote in distinction to perceived company need.

Broader trade union support

Just over eight out of ten (83%) of our survey respondents reported that they had been supported in their role by their respective unions. Such support typically included the provision or arrangement of training, the provision of information, literature and resources and general advice, guidance and encouragement. Less common, but perhaps of greater significance, the support of the wider union was also utilized to facilitate more formally the ULR role at the workplace. Thus, broader union support was elicited to help arrange meetings with management and to ensure that ULRs received time off to undertake their duties. Broader union support also plays an important role in the establishment of ULR networks beyond specific workplaces. For example, ULRs from BECTU, GMB and ISTC reported that their role had benefited from being linked to learning projects involving their unions and the wider networks that evolved as a result of this.

It is not clear whether the support received by ULRs was provided primarily by full-time or regional officials, or by local branches, although given that the educational resources of most UK unions are located at national level (Forrester, 2001: 323), it is perhaps unsurprising that we found relatively few ULRs explicitly referencing the support of their local branch. Branch level support, both for the ULR role, and for the broader learning agenda, was nevertheless regarded as significant by those ULRs who experienced it:

The Branch Secretary is on board with all aspects of the ULR, and is interested in members improving their skills. (ULR, BFAWU)

Tellingly, only a small minority of ULRs appear to have actively engaged with their local branch in order to promote the learning agenda, although, where they have, this approach has clearly generated successful outcomes:

I supported my branch with a bid to the TULF. This resulted in the branch receiving £50,000 to run a project aimed at the employees of XXXX Council with basic skills needs. (ULR, GMB)

Despite acknowledging the support they had received from their unions, a number of ULRs nevertheless suggested that additional support was required. Particular emphasis was placed on training to develop further skills appropriate for the ULR role:

More training is required, especially in relation to the identification of basic skills needs. Two of the current ULRs are considering more training. (ULR, BECTU)

Such considerations may have merit, given the evidence that many union-led learning initiatives are dependent upon 'enthusiastic local actors' (Munro et al., 1997), who, though able to initiate projects, may not have the skills to sustain them over the longer term. Such considerations also have particular relevance with respect to bargaining, since our findings suggest that some ULRs have not sought to negotiate with their employers because they lacked the necessary skills and experience, whilst others who are already bargaining with employers, even if on an informal basis, may need to develop additional skills in order to maximise their effectiveness.

The background of ULRs themselves is also likely to be an important factor shaping their insertion into broader trade union structures and the degree of support they are likely to receive. In other words, in some cases ULR positions will be taken up by those with traditional activist backgrounds, while in other cases the role may appear attractive to potential new activists as 'a union job with none of the stereotypical images of the shop steward which many find off-putting' (Munro and Rainbird, 2003: 4). This area remains relatively unexplored, but it is possible to hypothesize that the former may be more able to elicit the broader support of the union and develop the bargaining potential of the role. While the latter, potentially more driven by the learning agenda itself, may find it more difficult to gain a foothold within trade union structures that, as Payne (2001: 386) notes, can sometimes 'view the lifelong learning agenda as a diversion of issues from worker rights, benefits and pay'. With these issues in mind, our survey of ULRs found that the majority also held other positions within their unions. Fifty one percent were shop stewards, while 48 percent also held the position of health and safety representatives. In contrast, just 27 percent of respondents had not previously held other union positions. This finding is consistent with the York Consulting (2003) evaluation, which found that 28 percent of ULRs were new activists. The ULR initiative continues to evolve, however, and it is encouraging to note that the proportion of new activists has

increased, compared to the 9 percent of ULRs who fell into this category in 2000 (Cowen et al., 2000). Less encouragingly, Smith's (2003) study found that many new activists were often motivated to become ULRs by instrumental considerations; regarding the ULR position primarily as a conduit to a stronger curriculum vitae or training opportunities, while lacking a strong attachment to trade union principles and goals. This is clearly an area that needs much further research.

It is also clear that the ULR initiative has the potential to create intra-union tensions, as a Unison ULR explained:

Unison is very keen on the ULR initiative, but there is a perception that someone within Unison feels that this is falling apart. [There is] much negativity from within the union at the moment [in relation to ULRs]. I get the impression they want to pull the plug on the whole lot. (ULR, Unison)

Such tensions appear to be magnified by the question of bargaining. ULRs who had not sought to negotiate with their employers typically suggested (quite correctly) that this was because the responsibilities of ULRs did not extend to bargaining, and that negotiations over learning were conducted within the framework of existing bargaining arrangements. However, there appeared to be a significant level of confusion amongst ULRs about where the responsibility for developing the bargaining agenda lay, with ULRs variously suggesting that this was the responsibility of national negotiators, workplace negotiating committees, or, perhaps unsurprisingly, given the project based nature of many workplace initiatives (Forrester, 2001), project workers. Indeed, as the following comment from a GMB ULR indicates, greater clarity in relation to the locus of responsibility for formal bargaining is required if ULRs are to maximize their effectiveness:

We need to discuss this [negotiating with employers] within the ULRs – to develop a common policy. This is not my role. I'm not a negotiator. This needs to come from the top.

Such suggestions may have merit given evidence that confusion over roles and responsibilities appears to be hindering the ability of ULRs to engage with employers, even when they apparently welcome trade union involvement with respect to training and development issues:

[The] Training and Development Officers have approached me [in relation to developing a training policy]. Why? I have referred them to the project officer. (ULR, Unison)

The ULR initiative also raises the spectre of inter-union tensions, not least because individual unions have differing positions with respect to the role of the ULR in relation to bargaining. At workplace level, such issues are clearly likely to have most resonance at multi-union sites, where early indications are that there has been either little attempt to co-ordinate the activities of ULRs from different unions or that one union has taken the lead with respect to this

initiative. The process of developing the ULR initiative, then, might perhaps benefit from a more strategic consideration of the relationship between the ULR role and wider trade union structures.

Discussion

This article has presented one of the first empirical investigations of the emergent union learning representative initiative. We have considered the types of learning promoted by ULRs, and the mechanisms utilized to assist with this, the potential sustainability of the initiative and the relationships that are being forged with employers and the broader trade union movement. The findings suggest a mix of optimism and concern. On the plus side, ULRs appear to have been successful in both promoting learning and in stimulating demand for learning, largely independent of employer interest. The activities of ULRs appear to have made some contribution to the goal of widening participation in learning, in the sense that most of their activities have been directed at those who have had little access to workplace learning opportunities. The initiative has the potential then, to enable 'learners of the workplace to unite' in order to challenge existing patterns of inequality as regards access to employer-sponsored training and development initiatives.

There is also evidence that ULRs are forging effective working relationships, and both informal and formal learning partnerships, with employers, which in some cases have extended well beyond their statutory entitlements and into the arena of negotiation. Likewise there is evidence that ULRs are embedding themselves into extant trade union structures and creating a platform for the emergence of new union activists (and potentially new members). However, the relationships evolving with employers and the broader trade union structures within which ULRs are inserted are giving rise to a degree of concern and, in some cases confusion, particularly over their potential to bargain around learning issues.

The position that ULRs find themselves in with regard to employers is clearly complex. At one level, our findings suggest that ULRs have been successful in retaining their independence from employers' interests in relation to learning, this being manifest not only in their lack of reliance on management support for their activities, but also in their ability to advance discussions with co-workers around the acquisition of transferable skills for broader employability. Further research is needed, however, to ascertain the extent to which ULRs have the autonomy to generate independent learning *outcomes* for those they represent, as distinct from the independent learning *agenda* to which they subscribe.

The potential role that ULRs can play in initiating and fostering partnership relations around learning with employers and other stakeholders would also repay further study. Munro and Rainbird's (2004a) work shows that 'single purpose' partnerships around learning, that focus on employee need and

that are union initiated, have the potential to be more successful than recent innovations in general purpose partnership for mutual gains. Thus, our study found clear evidence that ULR activity benefited those workers that historically may not have had either access to, or interest in, training and learning opportunities. Furthermore, we found specific examples of ULRs looking to enshrine this activity within formal and informal partnerships with employers and other stakeholders, and there was a degree of enthusiasm for developing the link with employers further in the future to ensure the sustainability of the ULR role. Yet, the broader degree of employer and management support for learning and skills development that Munro and Rainbird (2004a) found in their public sector investigations was not replicated across our sample. Indeed, it was clear that a certain degree of employer antipathy to the ULR role constrained the ability of ULRs to pursue consistent employee benefits, formalized through partnership arrangements, around learning. Accordingly, there was evidence that ULRs were looking for a greater degree of support for their role from management, a finding that corroborates recent TUC research (TUC, 2004).

This reveals starkly the limitations of those that consider the statutory rights for ULRs as symbolic of a post-voluntarist turn in the British training system (see Clough, 2004). For in the absence of *statutory obligations upon employers*, decisions about time-off for learning and the relevance of specific learning provision will remain susceptible to management prerogative. This will also hamper, of course, the ability of ULRs to establish workplace learning partnerships and agreements and extend the learning agenda into the arena of negotiations. As our empirical findings suggest, attempts by ULRs to develop more formal relations around learning with employers was limited and, while there were some notable successes, the potential for their efforts to be harnessed by employers in the pursuit of managerial objectives remains ever present. Indeed, such considerations are particularly pertinent given the governmental emphasis on the role ULRs can play in supporting the development of *employer* training strategies. To this end, one limitation of our study is the neglect of employer and managerial perspectives on the ULR initiative, and future research on the managerial calculations for engaging with ULRs and developing learning partnership and agreements, and the contexts where this is more likely to occur, would be particularly worthwhile.

In terms of the position of ULRs within broader trade union structures, the findings reveal a number of potential tensions, again most notably in relation to bargaining. Many ULRs were confused about whether they should be seeking to extend their role around bargaining or not, and there was considerable ambiguity about where the locus of responsibility for this function properly lies. Such tensions undoubtedly reflect the current lack of clarity in the conceptualization of the ULR role within the context of trade union renewal strategies. To the extent that ULR activity is directed at harnessing learning benefits for employees, partnership activity in this area does not necessarily pose broader challenges to the union organizing agenda (see Munro and Rainbird, 2004a); it may even contribute to it. But much will depend here on the specific experiences

and capacities of ULRs, the levels of resources they can access to enhance their capacities and the broader support and strength of the trade union institutions into which they are inserted. Overall, our evidence in relation to the contribution that the ULR initiative has made to trade union renewal is mixed. Our findings indicate that the proportion of ULRs who are new activists, though increasing, nevertheless remains low. This is doubly disappointing given the suggestion that many new activists are motivated by instrumental considerations rather than the collective values that underpin trade unionism (Smith, 2003). More encouragingly, our findings suggest that ULRs have experienced some success in stimulating interest in trade union membership amongst non-union members, but further research is needed to establish whether this has been translated into increased recruitment.

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Appendix

Appendix I Distribution of survey returns by trade union

<i>Union</i>	<i>Number of respondents</i>	<i>Percentage</i>
AMICUS	2	3
BECTU	3	5
BFAWU	9	15
FBU	3	5
GMB	14	23
ISTC	6	10
PCS	1	1.67
RMT	1	1.67
UCATT	1	1.67
UNISON	18	30
USDAW	1	1.67
Union not specified	1	1.67

Notes

- 1 The rights came into force from April 2003.
- 2 The Skills Alliance represents 'a new social partnership between Government, the CBI (Confederation of Business and Industry), the Trades Union Congress (TUC) and the Small Business Council ... it will pursue a shared agenda in raising productivity for the common good' (DfES, 2003: 28).

- 3 Rainbird et al. (2003) make an important distinction here between *restricted* and *extended* resolutions. The former will result in learning investments that are beneficial to employers, whilst the latter are more beneficial to employees (with the employer accruing a potential indirect benefit).

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