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A collective learning culture

A qualitative study of workplace learning agreements

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Unionlearn is the TUC organisation that supports union-led strategies on learning and skills. It helps unions to open up learning and skills opportunities for their members and also to develop trade union education for their representatives and officers.

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Foreword

An even balance of power between employer and union can maximise productive learning agreements. They can result in a win-win situation: the quantity and quality of training increases, employers gain from the increased productivity and employees receive a wage premium for their enhanced skills. These case studies by Leeds University provide hard evidence of these mutual gains.

An analysis of data from the 2004 Workplace Employment Relations Survey by the University reveals that where unions were recognised, and able to negotiate with management over training within the workplace, employees were 24 per cent more likely to receive training¹.

Joint action is often underpinned by learning agreements between unions and employers. Union Learning Fund projects have resulted in a significant increase in learning agreements in recent years. Some are formal, others informal. Many have established workplace learning committees to identify needs, plan provision and monitor take-up. Some have also established learning centres. The statutory backing for trained union learning representatives has done much to deliver the agreements.

In each case study in this report, union influence in relation to the learning agenda increased as a result of the development of a learning agreement. This paper will therefore help buttress the TUC's argument that there should be a regulatory framework to establish more learning agreements and workplace learning committees in union-recognised workplaces.



A handwritten signature in black ink that reads "Liz Smith". The signature is written in a cursive, flowing style.

Liz Smith
Director, unionlearn

¹Stuart, M. and Robinson, A. (2007) *Training, Union Recognition and Collective Bargaining: Findings from the 2004 Workplace Employment Relations Survey*. Unionlearn research paper 4. Centre for Employment Relations, Innovation and Change, University of Leeds.

Abstract

This paper presents an initial empirical assessment of the significance of learning agreements. It draws upon six case studies of organisations where learning agreements have been concluded in order to explore the nature and scope of such agreements; how they connect with the broader industrial relations environment; and whether they have influenced the development of organisational learning cultures and performance outcomes.

Our findings suggest that the adoption of a partnership-based approach to learning is more important for the advancement of the learning agenda at the workplace than the conclusion of a formal learning agreement. Such agreements are nevertheless able to contribute to the sustainability of learning partnerships when they result in the establishment of effective workplace learning committees, and embed trade union involvement in the development of the learning agenda. Equally significantly, our findings indicate that the best outcomes in terms of the trajectory of employee participation in learning and the development of workplace learning cultures are associated with learning partnerships in which there is a relatively even balance of power between employers and unions.

Project aims and methodology

1.1 Background to the study

The importance of human capital to a vibrant and economically successful knowledge economy is widely recognised. It is against such a backdrop that, during its time in office, the Labour Government has advocated a commitment to the lifelong learning agenda, supporting this commitment with a wide variety of initiatives. For example, the National Advisory Group for Continuing Education and Lifelong Learning was established with a remit to advise on widening participation in learning, and the Skills Task Force was instituted in order to develop a national agenda for skills. It has also, unlike the previous Conservative administrations, recognised that the trade union movement can play an important role in advancing the learning agenda, both in the workplace and beyond.

As the TUC has pointed out, trade union involvement and presence can impact positively on a range of learning outcomes, something that has also been recognised in academic research. Green et al. (1995) found that employees in workplaces where trade unions were recognised had a much greater likelihood of receiving off-the-job training than employees in non-unionised workplace, and that unionised workplaces were more likely to have training and learning plans. Similarly Cully et al. (1998) found a positive association between trade union recognition and both the availability of training and the amount of training undertaken by employees, while Heyes and Stuart (1998) demonstrated that further positive benefits accrue with respect to training and learning when trade unions are also able play an active role in developing workplace learning strategies. More recently Stuart and Robinson's (2007) analysis of data from the 2004 Workplace Employment Relations Survey revealed that, when unions were recognised and able to negotiate with management over training within the workplace, employees were 24 per cent more likely to receive training. The TUC has thus long campaigned for the broadening of the bargaining agenda to include training and learning issues and for a more structured and committed approach to investment in human resources by British employers.

The Labour Government has sought to involve trade unions more formally in the development of learning cultures in the British workplace in a number of ways. Firstly, the Union Learning Fund (ULF) was established in 1998, with the explicit objective of supporting union-led workplace learning initiatives. Secondly, and more significantly, the 2002 Employment Act granted statutory rights to trade union learning representatives (ULRs). Originally conceived as workplace-based learning mentors providing advice and guidance about local learning opportunities to colleagues, the role of the ULR has, in some cases, evolved to embrace a broader range of functions such as accessing funds to develop workplace provision and negotiating with employers. Thirdly, and most recently, the White Paper 'Skills: getting on in business, getting on at work' (2005) made a significant financial commitment to the development of a Union Academy, unionlearn, which will, among other things, facilitate the expansion of the ULR network. From Spring 2007 unionlearn will also take on the responsibility for the administration of the ULF.

Trade unions themselves have commonly presented learning as an organising issue to members and, particularly, potential members, but have typically sought to position learning issues within a mutual gains framework in discussions with employers, since all parties have something to gain from increased investments in training and learning. It is argued that this basis of mutual gains creates a viable platform for the promotion and establishment of more partnership-based approaches to industrial relations. This strategy has been endorsed by the Government, which indicated in its early Green Paper 'The Learning Age' (1997) that it regards learning as "a natural issue for partnership in the workplace between employers, employees and their trade union". Yet evidence suggests that unions have, historically, faced significant difficulties in advancing the learning agenda at the workplace. The big question is whether anything has changed, given the more supportive environment now facing the union movement with regard to the learning agenda.

On the one hand, it is clear that little progress has been made in establishing learning as a formal issue for collective bargaining. According to the most recent Workplace Employment Relations Survey, just 8 per cent of workplace union representatives negotiate over employee training – though this figure increased significantly between the most recent survey conducted in 2004 and the previous one in 1998. Yet, on the other hand, three-fifths of the ULRs surveyed by the TUC in 2005 reported having a learning agreement between the union and employer in place at the workplace, with over three-quarters of these being formal agreements. Yet many questions remain.

Little is known about the nature and focus of such learning agreements, particularly in respect to whether learning is positioned as an integrative or a distributive concern. Similarly, there is scant information about the processes that lead to the development of learning agreements, and about the relationship between such processes and developments within the broader industrial relations environment. It is also not known to what extent the processes leading to the establishment of learning agreements have had any impact upon organisational learning cultures or performance outcomes.

The University of Leeds was commissioned by unionlearn to explore these important questions in order to advance our knowledge and understanding. This report presents the findings of this research.

1.2 Research aims and methods

This report presents the findings of a study that examined a number of learning agreements between trade unions and employers at workplace level.

The study had three primary objectives:

- First, to examine the nature and scope of learning agreements; identifying the key factors that led to their conclusion; who led them; whether they represented formal or informal arrangements; and what issues were covered.

- Second, to explore how the development of learning agreements connected with the broader industrial relations environment; identifying how the agreements are positioned relative to existing consultation and bargaining arrangements and workplace trade union structures; how they link to integrative and distributive concerns; and whether the agreements have led to the broadening of the bargaining agenda, or influenced the nature of the relationship between trade unions and employers, or between trade unions at multi-union sites.

- Third, to investigate whether learning agreements have influenced organisational learning cultures and performance outcomes; whether they have had any demonstrable impact on employee access to and opportunities for learning and what types of learning; whether they have influenced the level of employer commitment and investment; and whether they have impacted upon employee and organisational performance.

Six workplaces located in England where learning agreements between trade unions and employers have been concluded were selected as case studies. They were:

- BusCo Group (Northshire): a subsidiary of a private sector bus operator
- City Council: a local authority
- DistribuCo (Nothernton depot): a distribution depot of a private sector logistics business
- NautiCo: a private sector shipbuilder
- Travelnet: a public sector public transport provider
- TurbCo (Eastown site): a private sector industrial gas turbine manufacturer.

Detailed case studies of each organisation are presented as appendices.

The researchers were provided with the contact details of the key trade union representatives involved in developing the learning agreement in each case.

Initial contact was made with these respondents, who facilitated the organisation of the research visits.

The unions present in these workplaces are referred in this study anonymously as unions A to F. Sometimes the same union is present in different workplaces, as detailed in different case studies. Where this is so, the union retains the same letter reference across all case studies.

The empirical approach was qualitative. Within each case study organisation an initial content analysis of any formal learning agreement was undertaken. Following this, semi-structured in-depth interviews were conducted with the key actors involved in the development of the agreement. Data collection was based upon a standardised interview schedule tailored to take into account whether respondents were management or trade union representatives, or representatives of other stakeholder organisations.

Management respondents included human resources managers, and training and development officers. Trade union respondents included branch officials, shop stewards and ULRs at the level of the workplace; and regionally based full-time officials and ULF project workers. Where appropriate, other stakeholders, such as representatives of partner organisations involved in learning provision, were also interviewed.

A total of 54 interviews were conducted between February and September 2006, with each interview commonly lasting between 60 and 90 minutes. A breakdown of interview respondents in each case study organisation is provided in Table 1 below.

Documentary material, including earlier and subsequent formal agreements relating to skills formation, was also consulted where available and appropriate.

The next section of this report details the key findings of the research. Section three comments upon the significance of learning agreements.

Table 1: Respondents interviewed in case study organisations

Organisation	Respondent type				
	Management representatives	Workplace union representatives	Regional FTOs	ULF project workers	Other stakeholders
BusCo	1	3	1	2	
City Council	3	5	2		2
DistribuCo	2	2		3	
NautiCo	1	7			
Travelnet	2	8		2	
TurbCo	3	4	1		

Key findings

2.1. The circumstances giving rise to learning agreements

Our case studies have identified three major drivers for the conclusion of learning agreements: first, skills gaps and skills shortages within the workplace; second, the objective of developing a more strategic approach to human resource development; third, the external policy environment manifest in regulatory frameworks; and fourth, specific government initiatives.

Within all the case study organisations, management and trade union representatives had common concerns about levels of workforce skill, with trade unions being particularly concerned to develop the transferable skills of their members in order to increase their employability. Yet, in each case, learning agreements, and the partnership-based approach to learning that such agreements either arose from or were intended to buttress, evolved in response to skills gaps and skills shortages. Partnership-based approaches to learning were thus often seen as a mechanism for extending the learning opportunities available to employees, which in turn was seen as an important means by which to respond to recruitment difficulties. This was particularly the case for BusCo, TurbCo and NautiCo, since all these organisations had experienced difficulties in recruiting adequately skilled labour. Yet the establishment of a partnership-based approach to the learning agenda was also seen as a vehicle to increase employee participation in learning activities, and thus to address skills gaps among the existing workforce within all the organisations. Within TurbCo, NautiCo and Travelnet this objective was also closely linked to the aim of developing a learning culture within the workplace.

The development of a partnership-based approach to learning also supported the development of a more strategic approach to human resource development within a number of organisations. At NautiCo this objective was intimately linked to a business process re-engineering (BPR) exercise designed to increase the competitiveness of the business, and was also central to the introduction of high-performance

working practices, greater levels of employee involvement, and changes to the organisational and industrial relations culture. Within both public sector organisations – Travelnet and City Council – the conclusion of a learning agreement and the development of a partnership-based approach to learning was similarly embedded within processes designed to develop a more strategic approach to human resource development. In each case this objective to some extent represented a response to the regulatory pressures faced by public sector organisations. The unsystematic approach to human resource management within Travelnet, exemplified by resources being allocated on a simple first-come, first-served basis had been criticised in a District Auditors' Report in 2002, while within City Council the development of the learning agreement was at the heart of a number of key corporate strategies reflecting both broader government lifelong learning agendas and the Council's approach to Investors in People (IiP) accreditation:

“The IiP assessors loved it [the learning agreement]. If I were going to sell learning agreements to another council I'd do it on the basis that it helps towards IiP.”
(City Council management representative)

Within DistribuCo and BusCo, the statutory rights granted to ULRs provided a major impetus for the development of learning agreements, since this enabled the unions to open a dialogue with management about learning issues. Such issues had previously been considered at corporate rather than workplace level within DistribuCo and were regarded as an area of managerial prerogative within BusCo. A further stimulus was provided within all the case study organisations by the availability of public funding for union-led workplace learning initiatives via the mechanism of the ULF, since this provided a major incentive for management to collaborate with trade unions in relation to the learning agenda. Learning agreements were particularly likely to emerge in instances where there was a perception that ULF monies were dependent upon such arrangements

being established, or where the development of a learning agreement was specified as a ULF project outcome.

2.2. The nature and scope of learning agreements

In all the case study organisations, the development of a partnership-based approach to learning, and the conclusion of learning agreements were made possible by the positioning of learning within a framework for mutual gains, and a recognition on the part of management that not only had the trade unions a significant role to play in attracting non-traditional learners and unskilled employees to learning activities, but that ULRs also represented a resource that was complementary (rather than in competition with) the human resources/training function. Well-established relationships between key individuals within management and the unions facilitated these processes in DistribuCo and TurbCo, but personnel change in management at strategic level provided an important catalyst for such developments in both Travelnet and City Council. Here, the appointment of key actors sympathetic to trade unions resulted in learning ceasing to be regarded as an area of managerial prerogative, paving the way for greater union involvement in advancing the learning agenda.

With one exception, all the learning agreements were of a formal nature. The exception was at BusCo, where the agreement was informal and unwritten. Yet significant variation is evident with respect to the original impetus for the development of the agreements and whether they were union or management-led. Union-led agreements were typified by those at DistribuCo, BusCo and TurbCo. At DistribuCo the processes that gave rise to the learning agreement were driven by workplace union officials. At the other two case studies, national and regional officials had played a more prominent role, as the workplace branches continued to place more emphasis on traditional bargaining agendas. At City Council, the process was largely management driven;

this was a reflection not only of the centrality of learning to a number of broader corporate strategies, but also of the fact that inter-union rivalries had prevented any co-ordinated union strategy in relation to the learning agenda. The impetus for the learning agreements at Travelnet and NautiCo, by contrast, appear to have been generated by a process of evolving mutual understanding between the key union and management actors, with both parties driving the process forward in tandem.

At DistribuCo and NautiCo, the learning agreements were drafted by union representatives, with only minimal input from management. In the case of DistribuCo this situation was to some extent born of the existing high-trust relations between management and workplace trade union representatives at the Northern depot, but also reflected the relatively low priority ascribed to the development of the learning agenda by management. Yet it is significant to note that representatives of only one of the unions operating at the depot were involved in drafting the agreement. While this reflected recognition arrangements within the company, it was also a consequence of longstanding inter-union rivalries at the depot itself, and this agreement therefore represents a de facto single-union agreement relating to learning.

At NautiCo, the hands-off approach of management to the development of the learning agreement somewhat paradoxically reflected the influence of management-driven employee involvement practices introduced as part of the BPR exercise designed to increase the competitiveness of the business. Representatives of all the recognised unions were involved in drafting the agreement here, however, since the relationships between the unions were characterised by close cooperation rather than rivalry.

At Travelnet, TurbCo and City Council, the agreements were jointly drafted by management and representatives of all the recognised trade unions. Regional union officials were also involved in the case of TurbCo and City Council. At TurbCo, this reflected that the original impetus for the learning agreement came

from regional officials. At City Council the involvement of regional officials and TUC representatives to some extent reflected the willingness of some branch officials to embrace broader sources of expertise, but was also a mechanism to diffuse inter-union rivalries within that organisation.

The informal arrangements at BusCo were similarly developed jointly by management and trade union representatives but, as in the DistribuCo case, one union rather than all the unions was involved. This was due to the numerical dominance of a single union rather than any recognition arrangements per se.

All the formal learning agreements are broad framework documents committing management and the unions within the case study organisations to the principles of partnership working in relation to the learning agenda, with the informal arrangements at BusCo being underpinned by the same concept. In addition to these guiding principles, the formal learning agreements clearly also establish reciprocal expectations that relate both to the agendas of the parties and to their operationalisation. Thus, while encoding employer support for union-led learning initiatives, they also commit the unions to support employer agendas relating to skills development. Similarly, while they commit the unions to encourage employees to engage in activities that will increase their skills, they also commit employers to ensure, first, that the principles of equal opportunities are applied to learning, and second, that issues relating to employee learning are not referred to disciplinary procedures.

In all cases the arrangements have established dedicated structures whereby management and the unions can consult in relation to the learning agenda and develop initiatives to advance this. In most cases such workplace learning committees² are also open to other stakeholders such as unionlearn, ULF project workers, the local Learning and Skills Councils, and local learning providers. It is significant to note that

none of the committees was designed to operate as a bargaining arena.

In most instances, the purpose of the workplace learning committee is to enable management, union representatives and, where appropriate, other stakeholders to jointly develop, implement and monitor workplace-based learning initiatives. In addition, the committees at Travelnet and NautiCo also have a remit to influence organisational policy in relation to learning. This is particularly significant, since it demonstrates that learning is not regarded as an area of managerial prerogative, and thus enables workplace unions to have some input into the development of broader human resource development strategy within these organisations. Thus at Travelnet the unions have been involved in developing pre-application courses for internal job applicants, in order to embed the principles of equal opportunities within recruitment practices; at NautiCo, union proposals to develop core training for leading hands and chargehands have been accepted by management. In these specific cases the learning forums meet regularly, and appear to be operating productively.

The workplace learning committees have been less effective at DistribuCo and City Council. In the case of DistribuCo, this is because management representatives have thus far failed to engage with the committee, because they have sought to distance themselves from what they have perceived to be a stalling union-led learning initiative. At City Council, by contrast, where workplace learning committees have been established at strategic and operational levels, management has failed to engage with the strategic level committee because of the need to prioritise operational concerns, while the operational level committees have been undermined by the failure of the unions to recruit and retain adequate numbers of ULRs.

² The term workplace learning committee is used generically here to refer to similar structures that have different titles in each of the case study organisations.

Substantive agreements granting paid leave for ULRs to undertake their duties, or for employees to attend courses, have been concluded in all the case study organisations. Such agreements were, however, reached at different points in time. At DistribuCo and City Council, they were reached prior to the conclusion of the formal learning agreement, and can therefore be regarded as having paved the way for a more formal commitment to a partnership-based approach to learning. Similarly at BusCo, despite the absence of a formal learning agreement, an informal substantive agreement was concluded with regard to ULR activity.

Such arrangements represent clauses within both the TurbCo and NautiCo learning agreements themselves, while at Travelnet they were agreed after the conclusion of the formal learning agreement. Subsequent substantive agreements were also realised at NautiCo. This is significant as it illustrates that the development of a partnership-based approach to learning is not a linear process, and that formal learning agreements can be utilised both to initiate and to buttress such evolving partnerships. The conclusion of substantive agreements within DistribuCo, Travelnet, City Council and NautiCo giving employees the right to time off for learning also demonstrates that unions have been able to establish learning as a bargaining issue, if to a limited extent.

The learning agreements concluded at DistribuCo and TurbCo have been explicitly designed to function as 'stand-alone' arrangements that are independent of existing bargaining machinery. In each case this reflects the focus that has been placed on the consensual aspects of the learning agenda, and the objective of realising mutual gains by preventing the use of learning as a bargaining tool within wider industrial relations debates:

“Learning needs to be separate because this stops the company from using it as a lever to get something out of it, and it stops the union from doing the same.”

(DistribuCo union representative)

Such sentiments are also evident at Travelnet and NautiCo, though in these organisations the learning agreements link to the grievance procedure. This indicates that management and union representatives within these two organisations recognise that issues relating to learning and skill formation have the potential to be conflicting as well as consensual, and that mechanisms are needed to address this. Nevertheless, in all four organisations the principle guiding the relationship between the learning agreement and traditional bargaining structures is that of creating a separate 'space' for the development of the learning agenda to prevent this being disrupted by developments in relation to broader, more potentially conflicting industrial relations issues.

The learning agreement at City Council is explicitly linked to the existing consultative framework, despite being badged as a 'stand-alone' agreement, since the operational level learning forums established by this are co-ordinated and supported by an established network of joint consultative groups. The joint consultative groups in turn report to the strategic level learning forum. The rationale for this was to ensure that the partnership-based approach to learning was embedded throughout the organisation. In practice, this objective has not been realised, since both strategic and operational level learning forums are largely moribund.

The informal arrangements developed at BusCo are also linked to the established bargaining mechanism since they emerged from discussions within this structure, and because the learning co-ordinator reports directly to the main negotiating body. Yet here too the approach of both management and trade union representatives has been to create a separate 'space' for the learning agenda, so that the activities of learners are not affected by broader employee relations concerns:

“We want a situation where we can talk about the industrial relations issues, but where this doesn’t affect what goes on in there [the learning centre]. The learning must be unaffected, therefore it has to be separate.”
(BusCo union representative)

This approach has been facilitated by the establishment of the learning forum within this organisation, which is mandated to consider only issues relating to the learning agenda.

2.3. Learning and the broader industrial relations environment

2.3.1. Trade union–management relations

The advancement of the learning agenda has had a positive impact upon relations between management and trade unions in four of the six case study organisations, although such developments have been uneven and have been influenced by a variety of contextual factors, including the existing patterns of industrial relations; relationships between the unions; changes within management personnel; and the development of organisational cultures and management employee relations strategies.

Within BusCo, Travelnet and NautiCo, the positioning of learning within a framework for mutual gains has been key to improved relations between management and the unions, since this has provided the basis for the establishment of a partnership-based approach to the learning agenda. The establishment of such partnerships has served to increase communications and improve the tone of discussions between the parties, although the outcomes of these developments have been varied. At BusCo improved communication has been most evident at corporate level, where the expertise developed by Union A in relation to learning has also served to increase the credibility of the union, although the same trend is discernible to a lesser extent within the Northshire subsidiary. At Travelnet and NautiCo the improvements in communication generated by

the evolution of a partnership-based approach to learning has also been associated with increased levels of trust between management and the unions. It is important not to overstate the influence of these developments, however, since personnel change within the management structure at Travelnet, and earlier managerial efforts to change the organisational culture at NautiCo, which have embraced the adoption of a more accommodative approach towards the unions, have also had a significant influence upon relations between the parties. Trust-based relationships have yet to be established within BusCo, however, reflecting that organisation’s history of adversarial industrial relations, and, within the Northshire subsidiary, the legacy of the 2004 industrial dispute.

At City Council the picture is less straightforward, largely because industrial relations within the organisation have been characterised by intense inter-union rivalries. Here, the advancement of the learning agenda has resulted in the relationship between management and those unions that have sought to position learning within a framework for mutual gains becoming less adversarial. Indeed evidence suggests that a partnership-based approach to learning involving these parties has begun to emerge. Relations between management and the one union that does not regard learning as a positive sum issue continue to be antagonistic in character, however. The difficult relationship between the unions is, then, the key stumbling block to the emergence of a fully fledged partnership-based approach to learning involving all the parties within City Council.

At DistribuCo and TurbCo, developments in relation to the learning agenda have had less of an impact upon the relationship between management and the unions than has been the case within the other case study organisations. In both instances this is largely a consequence of longstanding high-trust relationships having already been established to the extent that, within TurbCo at least, the partnership-based approach to learning can be regarded as a natural extension of existing relationships. Indeed, within TurbCo recent

changes in management industrial relations strategies have had considerably more influence on patterns of industrial relations than the development of the learning agenda, since these appear to have been designed to marginalise trade union influence by bypassing existing consultative forums.

Within all the case study organisations issues relating to skill formation were addressed within established bargaining forums prior to the conclusion of the learning agreements, and at TurbCo and NautiCo extensive formal agreements relating to skill formation and skill utilisation had been concluded before discussions about the learning agreement commenced. In the other four case study organisations, however, the unions have been unable to utilise the existing machinery to influence the development and direction of organisational strategy in relation to the training and development of staff. The learning agreements concluded at Travelnet and NautiCo are particularly significant in this regard, since these agreements clearly provide for union input into the development of human resource development strategy.

The substantive agreements relating to time off for learning concluded at DistribuCo, Travelnet, City Council and NautiCo during the process of establishing partnership-based approaches to learning are also significant since they demonstrate that the unions here have established learning as a bargaining issue. Furthermore, because these agreements were primarily designed to enable employees to utilise the learning centres established by ULF projects, they also reflect broader trade union concerns relating to the employability of their members within external labour markets.

Within all the case study organisations learning is nevertheless regarded as an issue that is separate from broader bargaining agendas, and within all but two the learning agreements that have been concluded have underlined this, because they have been consciously divorced from broader bargaining structures. Because of

these factors, the advancement of the learning agenda has not generally led to a broadening of bargaining issues within any of the case study organisations. Developments in relation to learning have nevertheless had a positive influence on the bargaining environment by changing the perceptions that the key actors have of each other, making discussions over potentially contentious issues less acrimonious. As a result, the unions have been able to make more effective representations on behalf of their members in relation to broader agendas within a number of the case study organisations: within Travelnet, the unions were able to negotiate for the introduction of water coolers throughout the organisation; at BusCo, Union A has been able to secure the introduction of corporate-level policies relating to alcohol abuse and assaults on employees that reflect on-going union concerns.

Given this trend, it is interesting to note that such processes have not been unidirectional. In some organisations, therefore, developments within broader industrial relations arenas have 'spilled over' into learning activities to some extent, despite the efforts of management and union representatives to prevent this. Such developments have been most apparent at TurbCo, where union officials have responded to more robust management industrial relations strategies by on occasion withholding information relating to learning initiatives from management representatives, such as when opportunities have arisen for the company to take part in broader community-based learning initiatives. Similarly, within Travelnet employees involved in a minor dispute relating to break times refused to attend courses in the learning centre, although it is noteworthy that this action was not supported by union officials, who suggested that their members would be 'cutting off their nose to spite their face'. Within BusCo too, there is evidence that many employees are unwilling to engage in learning activities because of suspicions relating to managerial motives that reflect the low-trust relations and the history of confrontational industrial relations within that organisation.

Significantly, these developments have, in no instance, resulted in learning ceasing to be regarded within the framework of mutual gains by management and union representatives, though they may signal that employees do not always perceive the learning agenda in these terms.

2.3.2. Inter-union relations: mutual gains for unions?

The learning agenda has the potential to form the basis for new collaborations between unions, and for the development of co-ordinated activities. Furthermore, because learning can be positioned as both a servicing and an organising issue, it has the potential to increase union membership and density, and thus union bargaining strength.

It is significant then, that relationships between unions have improved notably within one of the case study organisations, Travelnet, with the increased emphasis placed upon learning. Here, the improvements in communications that both facilitated and sustained the partnership-based approach to learning also enabled unions to develop a co-ordinated approach to the learning agenda. These developments have been sustained by the ULR meetings, which increased communication between the unions, but were made possible largely because there was no history of inter-union rivalry within Travelnet, though union organisation was highly fragmented. Aside from increasing their influence within the organisation as a result of having an input into human resource development strategy, unions have also accrued mutual gains because, in working together to advance the learning agenda, they have reduced the capacity of management to benefit from their fragmented organisation, since a union operating in one part of the organisation is no longer able to play off against those operating in another.

Union activity in relation to the learning agenda at City Council, has, in complete contrast, both highlighted and amplified longstanding rivalries between unions at the organisation. To a large

extent this has been a consequence of individual unions having different perspectives both on the significance of the learning agenda and how it relates to strategies for union revitalisation, and on the utility of partnership as a form of accommodation with employers. However, it is also a reflection of the smaller unions within the Council having utilised the learning agenda to outmanoeuvre their larger, better organised rival, rather than to develop new collaborations. In the context of hostility and competition for members, then, union officials have been unable to recognise the potential for the learning agenda to deliver mutual gains for the unions themselves, still less to capitalise on this.

Relationships between unions operating at DistribuCo, BusCo, TurbCo and NautiCo have not been significantly influenced by the recent focus on learning. In the case of TurbCo and NautiCo these relationships were already based on close cooperation within the framework of existing bargaining structures, and activity designed to advance the learning agenda has been based upon shared agendas, and a common acceptance of the mutual gains framework. Thus, in the case of TurbCo, all the unions have been committed to developing learning initiatives that benefit all employees irrespective of their trade union status, but have also acknowledged that such activity can generate business benefits for the company. Similarly at NautiCo, all have focused on utilising learning both to support processes designed to increase the competitiveness of the yard, and to increase the employability of members within internal and external labour markets. In both cases, however, the development of common union objectives in relation to learning has been facilitated by high union density, since this has meant that learning has not been positioned within rival strategies for union renewal.

The advancement of the learning agenda at DistribuCo has made little difference to the acrimonious relationship between Union D and Union E. This is largely a consequence of recognition rights at the depot, which have enabled Union D

to develop learning initiatives in isolation. Union D officials have nevertheless utilised the learning agenda to underscore the union's position of dominance, and the learning agreement represents a de facto single-union agreement, because it commits the ULRs, both of whom are organised by Union D rather than the unions per se, to work in partnership with management in relation to learning. As at City Council, then, existing inter-union rivalries have precluded unions from utilising the learning agenda to derive mutual gains, and in these particular organisation some unions have accrued benefits from the development of the learning agenda in terms of having increased dialogue with management, while others have not.

The notion of trade unions accruing mutual gains from learning has not gained widespread recognition within BusCo, largely because Union A represents the vast majority of unionised employees within the company. Union A has therefore driven forward the learning agenda independently of the other unions representing BusCo employees, with this having little influence on relationships between the unions. There is, however, no evidence that Union A officials have sought consciously to use the learning agenda to reinforce the union's dominant position within the organisation.

2.4. Learning: a production or distribution issue?

While learning is commonly regarded as a production issue with the potential to generate mutual gains for employers and trade unions, the interests of the parties are not completely identical or necessarily congruent. Concerns relating to the distribution of learning opportunities, as well as to the relationship between reward systems and skills formation in particular, are distributive in character and therefore have the capacity to generate conflict.

Each of the case study organisations has a dedicated training function, with some providing a wide range of training opportunities for employees.

Yet in all the organisations blue-collar workers and those engaged at the lowest levels within the organisational hierarchy have historically had fewer training and development opportunities than those in white-collar posts or management positions. The learning initiatives generated by the partnership-based approaches to learning have done much to address this imbalance, as these have primarily focused on the provision of basic skills and IT courses, and as such have been responsive to the needs of those employees who have traditionally had limited access to workplace learning.

The impact of partnership-based approaches to learning on patterns of employee access to employer-sponsored vocational learning is more difficult to assess. Although employees in a number of the case study organisations have been stimulated to apply for employer-sponsored training as a result of positive learning experiences within the union learning centres and the development of workplace learning cultures, it is not clear how widespread such developments have been. Furthermore, within a number of organisations, line manager reluctance to release employees for training is a significant barrier to increased participation in learning. Yet our case studies have revealed that union representatives are increasingly seeking to highlight the positive relationship between skills acquisition, improved performance and the achievement of corporate objectives when negotiating training access with line managers:

“The unions have been quite clever in how they’ve sold basic skills [to line managers] as they’ve linked this to health and safety. They’ve pointed out that there’s no point sending people on mandatory health and safety courses if they come back to the workplace and can’t read the signs.”
(City Council management representative)

“We have trouble with some managers of course, but we just say ‘what’s your scrap rate, mate?’”
(TurbCo ULR)

All the formal learning agreements have clauses that promote equal opportunities in relation to learning. This is significant since in establishing this principle the agreements provide a basis for the trade unions to negotiate over employee access to employer-sponsored training. Indeed, within Travelnet, City Council and TurbCo union representatives have sought to utilise both corporate-level management support for the principle of equal opportunities that such clauses represent and the relationships built with managers operating within the human resources or training function in the course of developing learning agreements when negotiating training access with line managers:

“If there was a couple of managers who were being bloody minded about letting someone go on a course for instance, they’d [union representatives] be on the phone to HR to have them straightened out.”
(City Council management representative)

Union representatives at DistribuCo and BusCo have demonstrated more reluctance than their counterparts in the other case study organisations to negotiate over access issues. Within DistribuCo this is because training falls within the remit of corporate rather than workplace-level negotiating forums. At BusCo, union representatives have sought to emphasise the consensual rather than the conflictual aspects of the learning agenda in the light of recent bitter industrial disputes. Additionally, however, the main focus of union activity in both organisations has been on increasing employee participation in learning because the learning initiatives are at an early stage of development, and learning cultures have yet to be established.

Issues relating to the relationship between skill formation and the reward system are addressed within existing bargaining and consultation structures within all the case study organisations. This has led to extensive agreements within TurbCo and NautiCo in particular. For this reason, and because the recent learning initiatives have focused on the development

of transferable, rather than job specific, skills, in no cases have unions sought to link the acquisition of such skills to remuneration frameworks, even though their acquisition may serve to improve the performance of individual employees, thus providing a prima facie justification for increased remuneration. The trade unions at DistribuCo and BusCo have also not attempted to link learning with reward systems because this is an area of managerial prerogative within these organisations that they feel unable to challenge.

Access to learning opportunities is itself regarded as an element of the reward system by representatives of the trade unions operating in Travelnet, not only because employees have the opportunity to gain transferable skills by undertaking courses in the learning centre at no cost, but also because learning provides access to internal labour markets, which enable skills acquisition to be rewarded by promotion to more stimulating and more highly remunerated work. Union representatives at TurbCo and NautiCo similarly suggested the operation of internal labour markets provided the opportunity for skills acquisition to be rewarded in this manner.

2.5. The learning culture and performance outcomes: business benefits?

The partnership-based approaches to learning that have been developed within the case study organisations have, in every case, increased the opportunities that employees have to undertake learning. This is largely because these arrangements have facilitated the establishment of workplace-based learning centres that address many of the barriers to learning faced by non-traditional learners, although the provision of non-vocational learning and basic skills and IT courses may have attracted employees seeking to develop transferable skills to increase their employability. In some cases, however, it is also because such arrangements have been buttressed by the conclusion of substantive agreements that entitle employees to take time off with pay for learning.

Within three organisations – Travelnet, TurbCo and NautiCo – these activities have had the effect of dramatically increasing employee participation in learning. Indeed, our case studies revealed that between one-fifth and one-half of the workforce in these organisations had used the learning centres that had been established. The position is similar at City Council, although the increase in participation has been more localised here, reflecting not only the size and structure of this organisation but also the location of the learning centre.

Although the majority of learning opportunities provided within the learning centres at Travelnet, TurbCo, NautiCo and City Council are non-vocational, evidence suggests that these have been used as a springboard to vocational courses by some employees. Moreover, the learning initiatives have led to the development of a learning culture within these organisations, since significant numbers of employees have embraced the concept of lifelong learning. Such developments have been facilitated by employees being able to access, often for the first time in many years, new forms of learning appropriate to their needs. At Travelnet and NautiCo, the development of a learning culture has also been facilitated by the learning initiatives having gone hand in hand with the development of a more strategic approach to human resource development, since this has enabled employees to appreciate that learning can facilitate career development.

Participation in learning activities has increased more modestly among employees at DistribuCo and BusCo, and learning cultures have yet to develop within both these organisations. The learning initiatives have been in place more recently in these companies however, and in the case of BusCo have been overshadowed by the legacy of industrial action. Yet evidence also suggests that management within both DistribuCo and BusCo remains to be fully convinced of the business benefits of advancing the learning agenda. To some extent this is because of a perception that learning impacts upon employee performance in the long rather than short term and

thus represents a cost rather than an investment. Yet somewhat paradoxically, given that skills gaps are common to both organisations, it also reflects the view (which remains resilient at line manager level within the other case study organisations also) that employees need only to develop skills that are specific to their current role.

Within all the case study organisations, 'hard' indicators demonstrating that the learning initiatives generated by the adoption of a partnership-based approach to learning have impacted positively on employee and organisational performance are difficult to discern. In many instances this is because it is impossible to isolate the impact of learning from that of other factors such as work reorganisation, changing levels of capital investment, new technology, developments in the legislative and regulatory framework, changes in organisational cultures and in human resource development, and industrial relations strategies. This is particularly so in organisations such as Travelnet and NautiCo, where the development of a partnership-based approach to learning has been intimately linked to the achievement of broader organisational change. That the best outcomes in terms of increased employee participation have been achieved within these organisations, however, underscores the importance of the learning agenda being systematically embedded within broader human resource management and organisational development strategies.

Evidence nevertheless suggests that the development of a partnership-based approach to learning has generated a wide range of 'softer' business benefits for all the case study organisations.

As detailed in Section 2.3 above, the advancement of the learning agenda has had a positive impact upon industrial relations in all the case study organisations because it has changed the tenor of discussions between management and union representatives, and in some cases has also improved inter-union relations. The business benefits of such developments are perhaps most noticeable within Travelnet. Here, the success of the learning forum has led directly

to the establishment of a Joint Negotiating Forum with a remit to consider broader industrial relations issues, establishing single table bargaining within the organisation for the first time. This development has served to greatly reduce the time spent by management and trade union representatives in separate discussions, and has thus given each more capacity for alternative activities.

The development of ULR networks has provided a valuable resource that both complements and to some extent extends the human resources/training facility in all the organisations, with the possible exception of City Council, where such networks are under-developed. Indeed, ULRs have contributed to the process of liP accreditation or re-accreditation in a number of the case study organisations; are now being utilised to deliver induction training within BusCo; and will run pre-application courses for internal candidates applying for posts in conjunction with the human resources department at Travelnet. For the unions, such developments present grounds for optimism as they are practical examples of partnership upon which they can build. ULR activity at Travelnet has also enabled specific union concerns about equal opportunities in relation to recruitment to be addressed. Yet unions clearly need to be alert to the dangers of incorporation since the success of the ULR initiative is predicated upon ULR independence from the management function.

The development of ULR capacity has also enlarged the internal pool of labour available to the human resources/training departments within the case study organisations, and indeed within BusCo some ULRs have taken up positions within these functions. While such individuals may, of course, be lost to the union movement, paradoxically it may be the case that they are better placed to advance union concerns in relation to the learning agenda within their new roles. Certainly learning partnerships are

more, rather than less, likely to flourish when key actors within human resources departments are sympathetic to trade unions, as developments at Travelnet and City Council attest. The movement of ULRs into managerial positions does, however, raise questions about the sustainability of the initiative at grassroots level. Unions, then, clearly need to recruit new ULRs to replace those moving into managerial functions if their members are to continue to benefit from the development of learning initiatives and impartial advice and guidance.

Provisions within the learning agreements concluded at Travelnet and NautiCo entitling the unions to input into the development of human resource development strategy have also provided the human resources/training functions within these organisations with a valuable stock of expertise. Furthermore, because this expertise extends both to knowledge of, and the capacity to access, external funding sources that facilitate the development of learning initiatives, both organisations have benefited from multiple funding bids that have increased their capacity to offer learning opportunities to employees. Thus at NautiCo, ULF funding was utilised to develop an on-site learning centre in the first instance, with TUFSE³ funding subsequently being accessed to provide core training for leading hands and chargehands, while at Travelnet a second successful ULF bid will extend the learning partnership approach across the public transport sector in the locality. Because Travelnet will be leading this initiative, the organisation has also benefited from the kudos generated by this development.

Increased employee participation in learning has meant that internal labour markets within Travelnet, TurbCo and NautiCo have operated more effectively. In each case this is because a greater proportion of employees have availed themselves

³ Trade Union Fund for the South East, a local initiative introduced by the Learning and Skills Council to supplement the ULF.

of such mechanisms than was previously the case, having first gained skills and confidence as a result of successful learning experiences. Within Travelnet such processes have been influenced by the changes in organisational culture that were facilitated by the adoption of a partnership based-approach to learning, since this has served to break down organisational silos. As a result, employees have been better able, and more willing, to move between the three different service areas that comprise Travelnet. Within all three organisations then, these developments have enabled the labour available to be utilised more effectively, while also reducing the costs associated with external recruitment activities.

The increased availability of learning opportunities for staff has been associated with improved staff morale within DistribuCo and Travelnet, and has enabled all the organisations to present themselves as a good employer within local labour markets; these are important considerations for organisations such as BusCo, TurbCo and NautiCo where recruitment difficulties have been persistent, and indeed modest increases in recruitment have been reported at NautiCo.

The development of a partnership-based approach to learning, especially where this has been evidenced by a formal learning agreement, has also generated business benefits by contributing to positive IIP assessments at DistribuCo, Travelnet and City Council. Similarly, the formal learning agreements developed at DistribuCo, TurbCo and NautiCo have provided evidence of harmonious industrial relations. This has been utilised in the case of DistribuCo to generate positive perceptions of the Northern depot among other companies within the supply chain, while at TurbCo and NautiCo this has been utilised within the wider community and with respect to the parent company respectively.

3. Summary and conclusions: the significance of learning agreements

The learning agreements concluded at DistribuCo, Travelnet, TurbCo, City Council and NautiCo, and the informal arrangements at BusCo, indicate that a partnership-based approach to learning has developed, or is developing, within each of these organisations. Yet these cases suggest that such processes are not necessarily linear, and that formal or informal agreements can be utilised either to initiate or to buttress the development of a partnership approach to learning. Furthermore, while the learning agreements concluded in the case study organisations share many similarities, they also exhibit significant variation in a number of key respects, which reflect differences in the nature of the learning partnerships that they either emerged from, or gave rise to.

The learning partnerships established at Travelnet and NautiCo resemble what have been described elsewhere as ‘labour-parity’ arrangements, in which there is a relatively even balance of power between the employer and the trade unions, and where outcomes reflect the interests of both parties.⁴ This has been manifest in the agreements concluded within these organisations encoding trade union involvement within the development of human resource development strategies, thus establishing this as an area of bilateral rather than managerial prerogative. The agreements in these organisations are also linked to the existing grievance procedures, and as such represent not only an acknowledgement that the interests of employers and trade unions in relation to learning are not always congruent, but also provide a mechanism for resolving disputes in relation to this issue.

The formal agreements that have been concluded at DistribuCo, City Council and TurbCo, and the informal arrangements at BusCo, by contrast, do

not embrace such provisions. The development of human resource management strategy therefore continues to be an area of managerial prerogative within these organisations, while learning, though regarded as having the potential to deliver mutual gains, is nonetheless positioned within a unitarist rather than pluralist framework. These outcomes, then, reflect that the learning partnerships within these organisations are more characteristic of what has been described as ‘employer-dominant’ arrangements, in which the balance of power is favourable to the employer, and the agenda primarily reflects employer interests and union compliance, rather than genuine cooperation. This is despite the unions having taken the lead in developing both the partnership-based approach to learning and the learning agreement within some of these organisations.

The significant point to note here, however, is that the best outcomes in terms of the trajectory of employee involvement in learning activities and the development of organisational learning cultures are associated with learning partnerships that resemble ‘labour-parity’ rather than ‘employer-dominant’ arrangements, and where those arrangements have underpinned broader change in relation to human resource management and organisational development strategies.

In all the case study organisations the advancement of the learning agenda has been made possible because a partnership-based approach to learning has been adopted (irrespective of the nature of that partnership), rather than because a formal learning agreement has been signed, as the case of BusCo demonstrates. Learning agreements do, however, serve to formalise the establishment of learning partnerships, and thus may contribute

⁴ For a full discussion of labour-parity and employer-dominant partnership arrangements see Kelly (2005).

to the sustainability of such arrangements. This is particularly likely to be the case when they secure trade union involvement within human resource development strategies, but is also so when they result in the establishment of dedicated forums for the advancement of the learning agenda. Yet developments at DistribuCo and City Council in this regard demonstrate that the significance of learning agreements should not be overstated.

Although contextual variables have influenced the development of partnership-based approaches to learning in each of the case study organisations, it is nevertheless possible to identify a number of common key factors that are associated with the development of effective learning partnerships. Similarly it is possible to identify a number of key barriers to the development of effective partnerships for learning. These are summarised in Table 2 below.

Table 2: Facilitators and barriers to effective learning partnerships

Facilitators		Barriers
Policy framework	Organisational	
<ul style="list-style-type: none"> ■ Statutory recognition for ULRs ■ Public funding for union-led workplace learning initiatives 	<ul style="list-style-type: none"> ■ Positioning of learning within mutual gains framework ■ Commitment of key actors ■ Key actors sharing understanding and goals ■ High-trust relationships ■ Stable industrial relations ■ Learning not explicitly linked to trade union renewal strategies 	<ul style="list-style-type: none"> ■ Trade unions and/or employers adopting adversarial modes of engagement ■ Turbulent industrial relations ■ Inter-union rivalries

Case Studies

Case study one: BusCo Group (Northshire)

The context

BusCo Group is a British-owned passenger transport company with operations in the UK, Ireland and North America. In the UK, the company currently operates bus, rail and tram services, and also has interests in rail freight and airport management. The company's bus division in the UK is currently comprised of 24 subsidiary companies, reflecting BusCo's acquisition of numerous other UK bus operators in recent years. BusCo has removed all local branding from the subsidiary companies, but each continues to operate with considerable autonomy, and has independent industrial relations arrangements, though both management and trade union representatives acknowledge that a more corporate approach has gradually been introduced:

“As time has gone by, BusCo has become more involved. There have been more policies and procedures developed centrally and passed down.”
(BusCo Northshire management representative)

BusCo's interests in Northshire began when the group acquired the company operating the majority of bus services in the district. This company had been established under the terms of an Employee Stock Ownership Plan (ESOP), and was itself the successor to the local Passenger Transport Executive. Employees received an average payment of £5,000 as a result of the buyout. BusCo Northshire currently employs some 2,100 staff.

According to both management and trade union representatives within BusCo Northshire, the promotion of the lifelong learning agenda within the bus division had its genesis at corporate level:

“It was a corporate initiative. There was definitely a group approach. We [BusCo Northshire] weren't involved at this point.”
(BusCo Northshire management representative)

In common with other employers in the sector, BusCo has experienced difficulties in recruiting and retaining staff, and a significant proportion of

employees in many BusCo subsidiaries are migrant workers who have English as a second language. Additionally, many employees have basic skills needs. The promotion and provision of learning opportunities to address these needs consequently came to be regarded both as a major component of BusCo's strategy for recruitment and retention, and as a route to improving customer service and business performance. Union A, which represents the majority of organised employees within the bus division, linked lifelong learning to broader issues relating to employability and developmental opportunities for staff. Discussions between corporate-level managers and representatives of the union within both formal and informal arenas led to a recognition that the learning agenda had the potential both to deliver mutual gains and to provide the central plank for the development of a partnership-based approach to human resource management issues. Several Union A officials nevertheless indicated that the union initially experienced significant difficulties in convincing management representatives of the need for initiatives that would facilitate such an approach.

The availability of ULF funding to support union-led workplace learning initiatives provided a catalyst for the advancement of a partnership-based approach to learning, and for increased trade union involvement in the development of the learning agenda within the bus division. ULF funding obtained in 2002 thus enabled BusCo and Union A to undertake pilot projects within three BusCo Group subsidiaries. Each initiative promoted lifelong learning, and facilitated the provision of learning opportunities for BusCo employees through the creation of local learning partnerships involving management and Union A representatives, local learning and skills councils and education providers, and the establishment of workplace learning facilities. More significantly, these projects also provided for the recruitment and training of ULRs, and learning co-ordinators, who would act as senior ULRs. Both management and union representatives indicated that it was envisaged that these projects would ultimately be 'rolled out' across the whole bus division. Some

progress has been made in this direction, with the statutory recognition provided to ULRs under the terms of the 2002 Employment Act providing a major stimulus for these developments. Indeed, a BusCo Northshire management representative indicated that developments within this subsidiary were precipitated wholly by need to respond to this legislation.

The nature and scope of the learning agreement

Although Union A has sought to negotiate a company-wide agreement in relation to lifelong learning, no formal learning agreement has yet been concluded. Following the end of the pilot projects, a joint seminar was held to progress the partnership-based approach to lifelong learning. At this event the union was presented with the Standard Operating Procedure, a document detailing how practice in relation to lifelong learning was to be standardised across the bus division. The Standard Operating Procedure makes reference to partnership working between BusCo and Union A throughout, and a number of Union A learning co-ordinators indicated that this document might prove to be a 'precursor' to a formal corporate-level learning agreement. It is, however, significant to note, first, that the Standard Operating Procedure was developed unilaterally by corporate-level management representatives, and second, that the document is perhaps inappropriately prescriptive in places, stipulating, for example, not only the roles and responsibilities of ULRs operating within BusCo, but also the criteria and process that should be utilised to select ULRs, with a model advert being supplied. This is a sensitive issue, because there has been significant disagreement within Union A in relation to the ULR selection process. Despite BusCo's rhetorical commitment to partnership then, the company's actions in this instance suggest that it is trying to delimit and control the activities of Union A in relation

to learning, a situation that has not gone unnoticed within some quarters of the union.

*"It's [the Standard Operating Procedure] very much a management document. Management are controlling the agenda. That's something we don't like."
(Union A Learning Co-ordinator)*

Subsidiaries within the bus division have a significant level of autonomy, and so it would be possible for management and union officials to negotiate learning agreements at local level, but there is no formal learning agreement at BusCo Northshire. However, a number of informal agreements in relation to learning have been concluded, laying the foundations for a partnership-based approach to the learning agenda. It is significant to note that these informal agreements were negotiated within the framework of existing bargaining mechanisms, as this suggests that learning is emerging as an issue that is integrated within, rather than divorced from, the existing industrial relations framework.

Learning centres providing a range of learning opportunities for staff have been established at all BusCo Northshire depots, reflecting the objective of rolling out the ULF pilot projects. Because further ULF funding was unavailable, this development was facilitated by an informal agreement that the subsidiary would fund the refurbishment of the room allocated for the largest learning centre, and Union A would allow the £12,000 'rump' left after the buyout to be utilised for equipment. An informal substantive agreement negotiated within the Joint Functional Council (JFC)⁵ also established that each of the subsidiary's depots would have two ULRs, each of whom would be able to spend half a day per week on union activities without loss of pay.

⁵The JFC comprises nine trade union representatives representing occupational groups rather than the unions that operate within the subsidiary (five drivers, two engineers and two from the administrative function), the managing director, the human resources director, and other managers on an ad hoc basis as appropriate.

A learning co-ordinator has been appointed by BusCo Northshire to organise learning activities and support the work of the ULRs. As with the learning centres, ULF funding was not available to support this initiative and so BusCo Northshire has taken on responsibility for funding. The learning co-ordinator's salary is therefore paid by the company, though he is engaged on a full-time basis as a Union A official in a similar manner to that of a convenor steward, and reports directly to the JFC. Although the decision to appoint a learning co-ordinator was taken unilaterally by BusCo Northshire management, Union A was supportive of this development. Subsequently, negotiations within the JFC led to the conclusion of an informal procedural agreement to establish a Learning Steering Group. This forum will operate as a sub-committee of the JFC, and will therefore formalise union involvement in developing the learning agenda within BusCo Northshire. Comprising BusCo Northshire's human resources manager, the learning co-ordinator, Union A branch officials and the learning co-ordinator from the nearby subsidiary that hosted one of the original ULF projects, the Learning Steering Group will have responsibility for developing learning initiatives that draw upon best practice both within and beyond BusCo Northshire. The formation of the Learning Steering Group is, however, also designed to facilitate the involvement of more parties within this process, since such responsibilities are currently the preserve of the learning co-ordinator.

The establishment of the Learning Steering Group to some extent reflects the commitment of both management and Union A to the advancement of an approach to learning based upon partnership working, but Union A support for this forum also reflects intra-union discord in relation to the process utilised to select the learning co-ordinator operating within BusCo Northshire, and represents union

attempts to prevent this role being incorporated within the management function:

*"I don't see him [the BusCo Northshire Learning Co-ordinator] as a trade union rep. He answers to the human resources manager."
(Union A branch official)*

Somewhat curiously, the BusCo meeting of the Steering Group decided that the ULRs operating within BusCo Northshire would be excluded from the Group except when their presence was required in relation to specific ad hoc issues. This may be a further indication that representatives of management and Union A intend to integrate, rather than divorce learning from, the existing bargaining framework. An alternative explanation for the exclusion of the ULRs, however, may be that key actors within management and Union A do not wish to disturb existing relationships between the parties with the introduction of new personnel:

*"They're [management representatives and Union A officials] always unwilling to include people who are not already involved in these sort of committees."
(Union A learning co-ordinator)*

Such concerns are especially pertinent given that BusCo Northshire has a history of relatively turbulent industrial relations, with management representatives stressing that the subsidiary is still in the process of recovering from the effects of a lengthy dispute that took place during the summer of 2004:

*"The company lost five million pounds and our customer base was irreparably damaged."
(BusCo Northshire management representative)⁶*

Another recently concluded informal agreement relates to the long-established Learning Fund, which

⁶ Passenger numbers have yet to return to pre-dispute levels. While some passengers may have elected to continue to use the services of other operators, it is significant to note that BusCo Northshire does not face competition on all its routes. Other factors that may have contributed to falling passenger numbers include the withdrawal of some services (mileage is now 4.5 per cent lower than before the dispute) and three increases in fares during 2005.

provides grants of up to £250 to enable employees to undertake non-vocational learning. Formerly the prerogative of management, responsibility for the administration of the fund will now lie with the learning co-ordinator, with changes to the fund being decided by the Learning Steering Group. These agreements then, have also served to increase union influence in relation to the developing learning agenda. As yet, however, no substantive informal agreements have been concluded that provide time off or payment for learning for BusCo Northshire employees.

Learning and the broader industrial relations environment: trade union–management relations

Historically, industrial relations within the bus division have been poor, and management has characteristically adopted a robust approach towards the trade unions, which were unable to have any significant influence on corporate strategies or policies as a consequence:

“We have got a very difficult relationship with the company. It’s a very hard-nosed multinational.”
(Union A branch official)

The recent focus on the learning agenda and the positioning of this within a framework for mutual gains has, however, led to an improvement in relations between management and the union at corporate level:

“The learning initiative broke the ice in the negotiating arena. Relations were crap. On every other issue we were struggling. It was all doom and gloom until we got to learning.”
(Union A branch official)

Such developments appear largely to stem from Union A having taken the lead on the issue of learning, and built up a level of expertise in this area. This has served

to increase the credibility of the union, and has in turn increased union influence in relation to broader bargaining issues. This has been manifest in the conclusion of a corporate-level agreement relating to pensions, and to the development of corporate-level alcohol and assaults policies, all of these having been long-term Union A goals.

Within BusCo Northshire, the importance of the learning agenda should not be overstated, since the 2004 industrial dispute has arguably been the most significant influence on industrial relations within the subsidiary in recent years.

This dispute was unconnected with learning issues, but was instead related to the annual wage claim. The dispute culminated in a three-week strike by Union A members, which forced financial concessions from management. In the immediate aftermath of the strike, however, management launched a counter-offensive signalling the intention to remove Union A facilities and check-off arrangements, proposals that were withdrawn only following the threat of further strike action, and an agreement from Union A that changes would be made to the composition and operating arrangements of the Central Negotiating Committee (CNC). The CNC had been criticised by management because its “impenetrable structure”⁷ made bargaining protracted and bureaucratic. The slimmed-down CNC now meets management representatives on a regular basis, an arrangement welcomed by Union A. Indeed, the increased dialogue resulting from the implementation of these arrangements has been attributed by Union A representatives to their adoption of a more confrontational approach towards the employer:

“We’ve earned a bit of respect [as a result of the strike]. If they didn’t have to, they wouldn’t talk to us.”
(Union A branch official)

⁷ The CNC is a sub-committee of the JFC. It represents drivers (the largest occupational group within BusCo Northshire) and was formerly comprised of 12 representatives, six of whom would be involved in negotiations with management. Agreements reached in negotiations then had to be discussed by the full CNC, and were not infrequently voted down by the committee’s non-negotiating members. Following the 2004 strike, the CNC was reduced to eight members, all of whom would be involved in negotiations.

This perspective is to some extent shared by management representatives, who have indicated that the strike has forced both the subsidiary and Union A to reconsider industrial relations strategies:

“Since the strike, we knew we had to do things differently, but the unions have had to change too.”
(BusCo Northshire management representative)

BusCo Northshire nevertheless introduced a range of human resources management practices that placed particular emphasis on direct communications with employees following the strike. Most notable of these has been the People Can Do project. This involved staff at all levels of the organisation looking for ways to improve the business, and a one-day course for drivers held at a local hotel that explained the business ethos of BusCo Northshire, while also providing an opportunity for employees to ‘have a go’ at a member of management. Significantly, however, the subsidiary has made no attempt to introduce alternative employee voice mechanisms.

It was suggested by some union representatives that the robust approach to Union A adopted by BusCo Northshire management immediately after the strike was driven by a corporate-level agenda, rather than by managers within the subsidiary. Indeed, there is some suggestion of divisions within BusCo Northshire management in relation to industrial relations issues, with some individual managers having apparently adopted a more conciliatory approach towards Union A in recognition that the union has the support of the workforce, and that union endorsement of change is necessary if the support of employees for BusCo’s operational strategy is to be obtained:

“[The manager] realised ‘Hey, we can’t bash these guys, we’ve got to work with them’... He told us: ‘I want to work with you because you’re strong’.”
(Union A branch official)

The recent emphasis placed upon the learning agenda within BusCo Northshire has been largely unaffected

by developments within the broader industrial relation arena. This is significant, and has to a great extent resulted from learning being regarded by both management and Union A as a consensual issue with the potential to deliver mutual gains. It also reflects the fact that, while learning has been considered within the existing industrial relations framework, it is nevertheless regarded as a separate issue that should be separate from broader bargaining agendas:

“We want a situation where we can talk about the industrial relations issues, but where this doesn’t affect what goes on in there [the learning centre]. The learning must be unaffected, therefore it has to be separate.”
(Union A learning co-ordinator)

This approach has facilitated the development of the learning agenda within BusCo Northshire, and the conclusion of the informal agreements outlined above. The agreement to establish the Learning Steering Group can arguably be seen as the most significant development within this context, since this creates a separate space for the development of a partnership-based approach to the learning agenda, while simultaneously embedding this agenda within the framework of existing bargaining structures.

Inter- and intra-union relations

The overwhelming majority of organised employees within both the bus division and BusCo Northshire are members of Union A. As a consequence, Union A has dominated the development of the learning agenda. The original ULF project, which provided a catalyst for the development of a partnership-based approach to learning within the bus division, was thus developed solely by Union A and BusCo, with no reference being made to the other unions that represent employees of the company.⁸ The developing learning agenda has not therefore provided a focus for any significant level of inter-union cooperation within the bus division generally, or within BusCo Northshire:

⁸ Members of the other unions, and employees not in any union, are nevertheless welcome to use the on-site learning facilities.

“It’s purely a [Union A] initiative. It’s not a matter of the other unions letting us lead, it’s a case of us telling them what’s going to happen.”
(Union A learning co-ordinator)

The evolving learning agenda has, however, had a significant influence upon the internal politics of Union A. It is now Union A policy for all ULRs to be elected rather than selected, but many officials operating within the bus division question the wisdom of this approach, as it creates the potential for committed ULRs to be removed if those they represent do not agree with the direction in which the learning agenda is being driven. Such concerns are particularly pertinent for Union A in the bus sector because many employees are drawn from the ethnic minority and migrant worker communities, and the union has sought to utilise the learning agenda both as an organising issue in relation to such workers, and to support broader Union A policies in relation to equality and diversity:

“There are 230 Asian workers at xxxx garage. Not one of them has got any chance whatsoever of progressing within this company. We used ULF money to develop courses for these workers, but there’s been a horrendous backlash from the white lads. I have to be very, very careful. If I run anything for the Asian lads, the white lads start saying you’re not doing anything for them. The racism is horrendous. I have to be very careful. I could get de-selected over these sort of issues.”
(Union A learning co-ordinator)

The question of whether ULRs should be elected or selected was, however, thrown into sharp relief by the process by which the post of learning co-ordinator was established within BusCo Northshire. It had been envisaged by Union A regional officials that the learning co-ordinator established within the nearby subsidiary under the auspices of the ULF project would assume responsibility for the Northshire subsidiary as part of the project roll out, continuing in this role as an elected representative. Yet management within BusCo Northshire elected

to establish a separate learning co-ordinator with responsibility for the subsidiary. Furthermore, despite this being a trade union role, the position was advertised as an internal BusCo vacancy, and there was thus no opportunity for candidates to stand for election. Questions were certainly raised within Union A about the bypassing of the union rulebook, and there was some suspicion that the individual appointed to the post of learning co-ordinator had colluded with management to facilitate this:

“This didn’t sit well with the other ULRs who were elected. The learning co-ordinator definitely came by a different route, but he’s starting to behave himself a bit more now.”
(Union A regional official)

Other concerns, however, related to whether it was appropriate for management to influence the selection of trade union officials, reflecting on-going debates about the potential for learning representatives to be incorporated within the management function.

The appointment of the Northshire learning co-ordinator was supported by the local Union A branch, and endorsed by the BusCo Northshire JFC. This, however, highlights other tensions within the union that relate to the positioning of the learning agenda within broader industrial relations frameworks at local level. At the admission of local branch officials, little emphasis is placed upon learning issues within this arena, with traditional bargaining continuing to dominate the agenda of the branch:

“The learning centre is not at the top of our list of priorities. We have far more pressing issues.”
(Union A branch official)

To some extent this approach reflects recent patterns of industrial relations within BusCo Northshire, but it is perhaps also influenced by the fact that ULRs are not fully integrated within local branch structures:

“ULRs are not part of the union committee. The branch is not all that interested. The secretary doesn’t give a buggery. They’ve got enough troubles of their own.”

(Union A learning co-ordinator)

Other emergent tensions within Union A relate to where the balance should lie between the promotion of vocational learning and non-vocational learning within the learning centres, concerns that reflect broader debates about where the balance of responsibility for funding training and development lies. Management within BusCo Northshire, as in other subsidiaries, is currently looking to utilise the union learning centres to provide job-related training, in line with proposals outlined in the Standard Operating Procedure. This approach is opposed in some quarters of Union A, where it is argued that the learning centres should continue to focus on non-vocational activities, and remain the preserve of the union. Indeed, there is some suspicion that BusCo has utilised ULF monies to subsidise its own investments in training facilities. The dominant view, however, is that development of joint facilities not only represents the embodiment of a partnership-based approach to learning, but is also the solution to the current under-utilisation of the learning centres, which, because they are now wholly supported by BusCo, may be threatened with closure as a consequence.

Learning as a distribution issue?

In some BusCo subsidiaries, Union A officials have attempted to negotiate with management in order to link learning and skills development with systems of remuneration, and have also sought to influence the distribution of corporate training opportunities in order to advance the equality agenda. This has not been the case within BusCo Northshire, however, and Union A officials have made no attempt to link training and development with broader distributive agendas. This reflects the positioning of learning as a mutual gains issue, but it may be the case that the union has purposefully focused on consensual aspects of the learning agenda, given the recent industrial relations

history of the subsidiary and the fact that partnership working in relation to learning is in its infancy.

It is significant to note that the learning centres are also at an early stage of development. These are, as yet, greatly under-utilised, and there would appear to be widespread ignorance among the workforce both of the learning opportunities available to employees and of the potential value of learning, despite on-going publicity by BusCo Northshire and Union A. There is some recognition among management representatives that many of the subsidiary’s employees are suspicious of managerial motives, and that this has influenced perceptions of the developing learning agenda:

“If it’s got a BusCo logo on the top you know what’s going to happen. It will be screwed up and thrown in the bin.”

(BusCo Northshire management representative)

Management representatives indicated that the priority for the learning partnership is to address these issues and engage more employees in learning activities, and that because of this Union A has yet to link learning to broader distributive agendas. There was nevertheless an acknowledgement that not all aspects of the learning agenda are consensual, and that conflict could arise in relation to such issues in the future as employees engaged with learning, and the union sought to support their developing aspirations:

“I don’t think we’ve reached that point yet because we haven’t switched a lot of people on to learning yet. I don’t think that very basic thing has been addressed... I can see that there is a potential for conflict, and you’re going to get more and more of that as people get better educated.”

(BusCo Northshire management representative)

Key actors within the Union A branch acknowledge that their understanding of the learning agenda, and the way in which this connects with both broader trade union agendas and the wider industrial relations environment, needs to be further developed:

“It’s [learning] not my area. It’s never been the top of my list of priorities, but I realise this is an area where we need to make progress.”
(Union A branch official)

This factor may then also explain in part why the branch has not sought to link learning and skills formation with broader distribution issues. It perhaps also provides an indication of why the branch has yet to engage management in discussions about time off for learning for BusCo Northshire employees.

The learning culture and performance outcomes: business benefits?

Though a corporate goal, the objective of adopting a partnership-based approach to learning in order that BusCo Group might develop as a ‘learning company’ appears not to have been wholeheartedly adopted within BusCo Northshire. Although the foundations for a partnership-based approach to learning have been laid within the subsidiary, traditional concerns have continued to dominate the industrial relations agenda and, as a consequence, there would seem to have been limited progress in developing a learning culture within the organisation. Certainly, a small number of employees have accessed the learning opportunities available within the learning centres. Around 50 employees use the centres each week, with 26 of these currently undertaking courses. The centres are nevertheless under-utilised, with drivers proving particularly difficult to engage.

At corporate level, BusCo appears to have accrued some positive benefits from adopting a partnership-based approach to learning. This approach has generated positive publicity for the company, and has enabled it to be presented as a good employer. Indeed, it is the view of some within Union A that this is the primary reason for continued management support for the partnership-based approach to lifelong learning:

“I’ve been told by our Regional Director that as long as the company looks good, they’ll keep on with the initiative.”
(Union A learning co-ordinator)

There has also been some improvement in labour turnover within some subsidiaries since the initial ULF project was launched, with this being attributed by corporate level managers to the lifelong learning initiative.

Within BusCo Northshire the business benefits of the learning initiative are, as yet, a little harder to discern, although it must be remembered that these are recent developments, and that the partnership-based approach to learning is in its infancy. Problems relating to recruitment and retention have intensified within the subsidiary since the 2004 strike, to the extent that some services had to be withdrawn. Although management and Union A representatives have differing interpretations of this, both indicate that broader industrial relations issues have had more influence on labour turnover than the availability of learning opportunities.

Given the trend in relation to labour turnover, it is perhaps something of a contradiction that management representatives indicate that workforce morale had improved since the conclusion of the 2004 dispute, and this perspective is not shared by Union A representatives. Management nevertheless indicated that it would be mistaken to attribute any improvement in staff morale wholly to the evolving learning agenda, because other factors such as the introduction of direct communication with the workforce have also played a role:

“I think people are more positive, but you can’t say that’s down to the learning because there’s so much else going on.”
(BusCo Northshire management representative)

The developing partnership-based approach to learning within BusCo Northshire has nevertheless generated tangible business benefits for the

subsidiary, because it has encouraged some ULRs to embrace the concept of career development, and BusCo Northshire has provided encouragement for ULRs wanting to utilise the skills they have acquired within this role in order to take up managerial and supervisory positions. Furthermore ULRs in BusCo Northshire, as in other subsidiaries, will be trained to deliver basic skills training to new starters as part of a revised induction programme. These developments suggest that the partnership-based approach to learning has enabled BusCo Northshire to better utilise the human resources available within the organisation.

Summary

In many respects, the absence of a formal learning agreement between management and the unions within BusCo Northshire is of little consequence. The positioning of learning within a framework for mutual gains and the detachment of this issue from broader industrial relations agendas have been key factors, which have led to the conclusion of a number of informal agreements that have enabled the learning agenda to be advanced. These developments have also paved the way for the establishment of a partnership-based approach to learning within the subsidiary. Most significant of the informal agreements is that which established the Learning Steering Group. This formalises partnership working in relation to learning, embeds this within existing bargaining structures, and may thus contribute to the sustainability of this approach in the longer term.

The subsidiary has a history of adversarial industrial relations, and it is significant that the learning agenda has been unaffected by developments in relation to broader employment relations issues. It remains to be seen, however, whether partnership-based approaches will be adopted in relation to broader agendas in the light of the practical achievements of this approach associated with learning.

The partnership-based approach to learning that is evolving within BusCo Northshire has generated significant benefits for Union A. The union's influence in relation to the development of the learning agenda has increased and, given developments at corporate level, it is possible that this may also increase at local level. It is nevertheless apparent that branch officials need to further develop their understanding of the learning agenda, and the way in which this connects with both broader trade union agendas and the wider industrial relations environment, if they are to fully capitalise on these developments.

BusCo Northshire has also accrued benefits from the adoption of a partnership-based approach to learning since this has enabled the subsidiary in some instances to better utilise the human resources available. If the subsidiary is to build upon these foundations, however, it is important that the independence of the ULRs is respected and preserved. This is particularly so given workforce suspicion of management motivation, and the current under-utilisation of the learning centres.

Case study two: City Council

The context

City Council is a local authority in the south of England providing a wide range of services to the local community. The Council employs around 10,000 staff, with approximately half the workforce being members of one of the recognised non-teaching unions. The Council has a dedicated training function and provides a wide range of learning opportunities for employees. Learning is also at the heart of a number of key corporate strategies developed in response to government policies relating both to local government and to the broader lifelong learning agenda. The Community Strategy is of particular relevance here, since this acknowledges that basic skills difficulties are widespread among the population of the city, and commits the Council to utilising workforce development as a mechanism to address these issues on the basis that the Council is a major employer,⁹ and that employees are also citizens.

The initial impetus for the development of a learning agreement came from attempts by the unions to secure a new facilities agreement for ULRs.¹⁰ This raised the profile of union learning, and the possibility that the unions would take a prominent role in developing the learning agenda within the Council, particularly as the numbers of ULRs increased:

*“The thought was that the ULRs would snowball. We were looking for the unions to take a lead.”
(City Council management representative)*

Personnel change within the management structure provided a further catalyst for the development of the agreement, since a newly appointed organisational and employee development manager¹¹ was keen to

conclude a learning agreement in order to develop a partnership-based relationship with the unions to advance the learning agenda, and to embed the ULRs within the organisational structure of the Council, so that they could be utilised to deliver strategic objectives in relation to learning. Indeed, representatives of Union B suggested that the management rationale for the agreement was primarily related to the need to gain firmer union buy-in for the Council’s strategy in relation to liP accreditation. A joint working group was established to develop the agreement, involving management and trade union representatives as well as regional TUC and Union C ULF project workers. The input of ULF project workers is particularly significant, reflecting both the willingness of local representatives of the Combined Unions¹² to defer to this expertise, and Union B’s rejection, on ideological grounds, of the concept of a partnership-based approach to industrial relations issues:

*“The whole concept of ULRs doesn’t fit easily with X [senior Union B official] and Union B. X never felt comfortable with the terminology of mutual gains and partnership. Union B here operates with a Marxist framework.”
(City Council management representative)*

In tandem with these developments, a local Union C official had developed an interest in union learning centres as a result of a visit to such a centre within another local authority. In a fortunate turn of circumstances that followed the conclusion of the learning agreement, the City Council branch of Union C acquired some unspent monies from a regional Union C ULF project. This facilitated the development of a union learning centre within City Council, and gave

⁹ Unlike many other local authorities, City Council has not sought to outsource routine manual functions. The council therefore remains a major employer of unskilled labour.

¹⁰ City Council has an extensive collective bargaining framework, but as this was developed prior to the evolution of ULRs their role was not covered by this.

¹¹ The organisational and employee development manager in question is no longer employed by City Council, having moved to a more senior position within another local authority.

¹² All the recognised non-teaching unions with the exception of Union B

rise to an embryonic partnership-based approach to learning between the Combined Unions and the Council, who gave their support to this initiative.

The nature and scope of the learning agreement

The learning agreement was concluded between City Council and the seven recognised non-teaching unions in January 2004. Though in essence a broad framework document that commits City Council and the unions to promoting lifelong learning through the activities of ULRs, the agreement is nevertheless extremely comprehensive, and thus provides a firm foundation for a partnership-based approach to lifelong learning to be firmly embedded within council procedures and practice.

As well as formalising the rights and responsibilities of the ULRs, the agreement has a well-developed procedural element. It thus provides for the establishment of a Strategic Partnership Forum (SPF) comprised of five union and four corporate-level management representatives, which has a remit to co-ordinate activities in relation to the learning agenda at strategic level. To facilitate this, the SPF has a mandate to co-opt, when management and unions are in agreement, members from external organisations such as the local learning and skills council and the TUC. A second procedural clause within the learning agreement provides for the establishment of a network of local partnerships, each of which has as its focus an individual ULR with an identified constituency of learners. Comprised of the ULRs, their manager, and a representative of the human resources function and the trade unions, local partnerships have a remit to support and guide the activities of ULRs, and ensure that these are complementary to the activities of related council functions such as human resources and training, and the Adult and Community Learning Section within the Directorate of Lifelong Learning and Leisure. According to one Union C representative, local partnerships also formalise the capacity of the ULRs to lobby for training resources, because they provide an

opportunity for the unions to have some influence in relation to departmental budgets.

Although the learning agreement is a single-purpose agreement, it is nevertheless explicitly linked to, rather than divorced from, existing bargaining machinery. It thus makes provisions for the activities of the ULRs and the local partnerships to be co-ordinated and supported by the existing network of joint consultative groups within each of the Council's directorates, with the joint consultative groups having a responsibility to report on this issue to the SPF. Significantly, the agreement provides for the joint consultative groups to dedicate part of their meetings to discuss the activities of ULRs, thus ensuring that the learning agenda remains a live issue at directorate as well as strategic level.

The structure of City Council has, however, provided a significant barrier to the potential of the learning agreement being fully realised. The agreement is a corporate-level arrangement and, according to representatives of both senior management and the trade unions, its impact at the level of individual directorates has been variable, with the development of partnership working in relation to the learning agenda being highly dependent upon the approach of directorate-level managers towards the broader learning agenda, and their perceptions of its significance within the framework of a target-driven approach to service delivery:

“Managers with a commitment to learning have a more productive relationship with the trade unions over learning, but attitudes towards the unions haven’t changed among managers without such a commitment.”
(City Council management representative)

Operationalising the procedural aspects of the agreement has also proved more problematic than was anticipated. Meetings of the SPF have been infrequent, and senior corporate-level management representatives have rarely been able to attend, because of the need to prioritise other strategic issues:

“There’s so much going on in the Council at the moment. We’re putting together the Strategic Service Partnership, and we are seeking to introduce Business Process Re-engineering in some areas. There are annual budget cuts. So the SPF isn’t the number one priority for HR. Attendance is delegated further and further down, to directors, and then deputy directors, because people are too tied up with other things.”

(City Council management representative)

More significantly perhaps, the concept of local partnerships, and therefore, arguably, the whole thrust of the agreement, has been undermined because all the unions have experienced difficulties in relation to the recruitment, and particularly the retention, of ULRs. Some ULRs have been lost as a result of the redundancies associated with restructuring; others gave up their positions because they were motivated by instrumental considerations, and had unrealistic expectations that they would quickly become qualified to act as tutors. Concerns over workload also led to ULR resignations, with this being especially evident when individuals held other trade union positions also:

“One of the reps is a convenor, health and safety rep and ULR and he says that the ULR role is the most difficult because of the need to be pro-active.”

(City College trade union studies tutor)

As a result, Union B and Union C have experienced a net reduction in the number of ULRs they support, while two unions with a small membership within City Council were unable to recruit any ULRs at all. There are, then, fewer than thirty ULRs operating within City Council in total, and only one fully functioning local partnership, raising questions about the effectiveness of the ULRs that do operate within the organisation.

City Council, in common with many other local authorities, employs significant numbers of low-skilled workers in routine manual and non-manual roles, and evidence suggests that many of the ULRs also lack the skills necessary to undertake this role.

This was exemplified by a recent incident in which the ULRs distributed a questionnaire in relation to a training needs analysis. Unable to analyse the data themselves, the ULRs were reliant on help from tutors at the local Trades Union Studies Centre. Similarly, ULRs arranging courses for members at the local college provided names, but not addresses, of participants to course tutors, who were unable to forward course materials as a consequence.

Questions have therefore been raised about the quality of ULR training in the region, which, it is argued, does not appear to recognise that the role of ULR is broader, and more demanding, than that of a shop steward or health and safety representative, and consequently does not equip ULRs with the skills they need to operate effectively:

“Learner rep training tells them what to do, but not how to do it.”

(City College trade union studies tutor)

Training courses provided for ULRs by Union B within the region, moreover, are more focused towards the needs of ULRs operating within the NHS:

“The learner rep courses are all geared to the NHS. There are many complaints from local government reps that the courses are not relevant.”

(City College trade union studies tutor)

There are also few sources of support for the ULRs from the unions within the Council. Senior representatives from Union B, Union C and Union A [this is first mention of Union A in this case study; isn’t Union A from previous case study?] all acknowledge that traditional industrial relations concerns continue to take priority, especially given the current backdrop of restructuring and budget cuts:

“We’re snowed under with other industrial relations stuff. We haven’t got the time.”

(City Council Union C representative)

The monthly learner rep meeting in theory provides a forum for ULRs to discuss their needs and develop

informal support networks. Yet this forum is less effective than might be the case because it has been undermined by inter-union rivalries, is badly organised, and poorly attended.

While the learning agreement has not enabled the Council to utilise the ULRs in pursuit of its strategic objectives in relation to learning in the manner that was envisaged, management representatives suggested that this has nevertheless served to buttress a number of existing council policies developed jointly with the unions, which advance both the learning agenda and broader policies relating to equal opportunities. Chief among these is the Minimum Learning Entitlement, which entitles all employees of the Council to a minimum of three days paid leave per year in order to undertake learning activities. The learning agreement has also, according to management representatives, facilitated the joint development of a Policy for Time Off for Essential Skills. Although currently awaiting finalisation, this provides for employees to receive paid time off to attend basic skills assessment sessions. Eligible employees are additionally entitled to receive three days paid leave, over and above the minimum learning entitlement, to engage in basic skills learning, providing this is matched by activities undertaken in their own time.

Learning and the broader industrial relations environment: trade union–management relations

Historically, relationships between management and the non-teaching unions within City Council have been extremely hostile, with industrial action being a significant feature of the industrial relations culture. Union density is high, and the unions are well organised and inclined towards an adversarial rather than accommodative response to management strategies. This is especially so in the case of Union B, which represents the majority of employees represented by the non-teaching unions. Indeed, according to one management representative, the strength of the unions has given rise to a degree of

inertia within management, whose perception is that the unions will oppose any attempts to introduce change, following successful union campaigns in relation to a number of issues, including outsourcing:

“The unions are very strong. Management are quite weak. There’s a sense that things are so embedded nothing can change. Management won’t take the initiative because they don’t think they can get anything past the unions.”
(City Council management representative)

Significantly, neither management nor union representatives indicated that the conclusion of the learning agreement, and the emphasis placed on the learning agenda more generally, has had a major influence on broader patterns of industrial relations within the Council. Officials of all the unions suggested that this was largely because the industrial relations agenda continued to be dominated by traditional concerns, especially since the legislative and regulatory framework governing the operations of local authorities had provided an incentive for restructuring, redundancies and attacks on the terms and conditions of employees:

“It’s [the learning agreement] a good agreement. A good framework, but it can’t be seen in isolation. On its own, it won’t change the industrial relations climate or the service delivery framework.”
(City Council Union B representative)

A Union B representative, however, candidly acknowledged that Union B favoured an adversarial approach towards management:

“There is no partnership approach, but that’s partly because we don’t want it to be a partnership.”
(City Council Union B representative)

One management representative similarly suggested that union officials were not genuinely committed to the concept of a partnership-based approach to learning, and had a tendency to utilise the relationships that had been built with key human

resources representatives in relation to learning for their own purposes rather than for mutual gains:

“They see it as a couple of people in HR that are friendly towards them. If there was a couple of managers who were being bloody minded about letting someone go on a course, for instance, they’d be on the phone to HR to have them straightened out.”

(City Council management representative)

Within this context, Union B was the subject of particular criticism, with one management representative suggesting that the union locally was not only opposed to the concept of partnership, but also lacked commitment to the learning agenda itself, being willing to engage with this only in order to comply with national and regional Union B policies:

“Union B went along with the learning agenda because they had to, but they prefer the back to the barricades approach.”

(City Council management representative)

Despite the evident hostility and mistrust characterising relationships between management and the unions, there are nevertheless grounds for optimism. Developments in relation to the learning agenda have changed the tone of contact between corporate-level managers and the Combined Unions in particular. To some extent this is because the learning agenda has been positioned as an issue for mutual gains, and union activities promoting the learning centre have not only addressed line manager reluctance to engage with the learning agenda but, in doing so, have also linked learning to the achievement of broader corporate objectives:

“The unions have been quite clever in how they’ve sold basic skills [to line managers] as they’ve linked this to health and safety. They’ve pointed out that there’s no point sending people on mandatory health and safety courses if they come back to the workplace and can’t read the signs. There’s a real problem with health and safety in [the city], so this has got to be applauded.”

(City Council management representative)

It is also a consequence of the involvement of external stakeholders, such as the TUC and City College, whose presence has served to dilute tensions between managers and union officials.

Furthermore, despite the proclamations of Union B officials, it is clear that partnership working has been established between City Council and the Combined Unions in order to establish and sustain the union learning centre. ULF funding acquired by Union C was thus utilised to equip the room provided by the Council to accommodate the Learning Centre, while the Council seconded an internal trainer to support learning activities undertaken by employees on a drop-in basis. Moves by Union B officials to arrange a Return to Learn event were also supported by the council, with accommodation being provided in a local school, but this event was cancelled because little interest was shown by Union B members. The failure of the Return to Learn event was especially unfortunate given Union B’s opposition to partnership-based approaches to learning and the success of the Combined Unions in establishing the Learning Centre, and indeed may have served to harden the attitudes of key Union B officials.

Inter- and intra-union relations

Although there has been co-ordinated action in relation to specific campaigns over issues of mutual concern such as budget cuts, the restructuring of services, outsourcing and pensions, relationships between the trade unions operating within City Council have historically been extremely poor. This in part reflects the differing political approaches of the unions for, while the Combined Unions have been willing to provide general support for the policies of the Council when it has been Labour controlled, Union B has preferred to either support or oppose council policies according to the issue rather than on the basis of the party in power. Similarly, while the Combined Unions have favoured developing a partnership-based approach to industrial relations issues, Union B has opposed this.

Relationships between the unions have also been coloured by intense rivalries over recruitment, and frequent allegations of poaching, which have been compounded by the issue of personality:

“I think he’s [Senior Union B official] got a phobia about us. He thinks we’re going to poach his members.”

(City Council Union A representative)

Because of these historical factors, there is no Joint Union Consultative Committee, as agreement could not be reached among the unions over the structure of such a body.¹³

Unfortunately, developments in relation to the learning agenda have both highlighted and amplified existing trade union rivalries. Indeed, a representative from Union B indicated that the recent emphasis on learning had made relations between Union B and the Combined Unions significantly worse. As a consequence, the unions do not have a co-ordinated approach towards learning, and the opportunities to develop a partnership-based approach to the learning agenda presented by the learning agreement have yet to be fully realised.

All the non-teaching unions operating within the Council are signatories to the learning agreement, yet disagreements between them delayed its development. A major source of dispute related to the fact that the agreement sought to regulate inter-union relations with regard to the learning agenda. It thus stipulates that each ULR should represent a ‘constituency’ of learners, and should therefore provide services to all members of that constituency irrespective of their trade union affiliation. This proviso was strongly opposed by Union B, reflecting not only recognition that learning could be positioned as an organising issue, but also perennial concerns about non-union free riders. Union B representatives were also suspicious that management had adopted this approach in order to limit the number of ULRs in

areas of operations where more than one union has members. Representatives of the Combined Unions, though similarly sceptical of managerial motives in relation to establishing constituencies of learners, which they regarded as a ploy to reduce union facilities, were not in principle opposed to the concept of inter-union cooperation.

Union B nationally has had an interest in workplace learning for almost two decades, and there is some suggestion that senior figures within the union locally are resentful that the Combined Unions have positioned learning within the servicing agenda more latterly:

“Union B wanted to do its own thing. The Union B argument was ‘we’ve been involved in learning for years, you’re jumping on our bandwagon’.”

(City College trade union studies tutor)

However, it is possible, given the highly personalised nature of inter-union rivalries within the Council, that Union B officials were resentful of being outmanoeuvred by the Combined Unions in relation to the learning agenda, perhaps regarding this development as a challenge to Union B’s position as the dominant union within the Council:

“Union B is generally much more on the ball than the Combined Unions. It’s much better organised and much better resourced. But it hasn’t been on this one.”

(City Council management representative)

Although represented on the SPF, Union B nevertheless initially had a policy of not attending the monthly learner rep meetings, preferring to establish separate arrangements. Union B representatives also expressed considerable disquiet in relation to the Learning Centre established by the Combined Unions. One issue of concern was that equality and diversity issues had not been taken into account when the Learning Centre was located within the Town Depot. The depot is situated

¹³ Union B would not agree to a structure where it was not in the majority. Likewise, the Combined Unions would not agree to a structure where Union B did have a majority.

on an industrial estate some distance away from the Civic Centre, and is characterised by a male, manual workplace culture. There may therefore be some validity in these arguments, and a Union C representative conceded that part-time female employees in particular were under-represented among those using the Learning Centre. Union B representatives were also concerned that the Learning Centre focused on the provision of basic skills and IT courses, and therefore not only duplicated facilities provided by the Council but also provided no opportunities for Union B members with access to those facilities to develop new skills. These arguments however, overlook the recent national policy focus on widening access and participation within workplace learning, and City Council's commitment to improving basic skills among the workforce. One Union B representative also raised concerns that the Learning Centre could be utilised by the Combined Unions to poach Union B members, but this allegation seems unlikely given that the Town Depot is already a 'stronghold' of the Combined Unions.

Representatives of the Combined Unions suggested that management support for the Learning Centre was interpreted by Union B officials as an attempt to marginalise the union. There was nevertheless a degree of triumphalism on the part of Combined Union representatives in relation to the fact that it had been their unions and not Union B that had taken the lead both in advancing the learning agenda within the Council and in establishing the Learning Centre:

“Union B hated the fact that we set up the Learning Centre. They saw it as City Council favouring one union over another... We are quite happy that we've been able to achieve what we've achieved here – and that they haven't.”
(City Council Union C representative)

Furthermore, the Combined Unions signalled their intention to retain their dominant position with respect to the development of the learning agenda by rejecting subsequent Union B offers of resources for the Learning Centre.

More recently, the Learning Centre has been a source of dispute within the Combined Unions themselves following proposals that the Centre should lose the word 'union' from its title. In this instance, entrenched positions were reached with startling rapidity, perhaps reflecting the broader culture of antagonistic industrial relations and low-trust relationships between the unions operating within the Council.

Though not a source of dispute between the unions, it is nevertheless significant to note that different approaches have been adopted by Union B and the Combined Unions for the recruitment of ULRs. Union B has thus focused on recruiting as ULRs members who have no other trade union role. To some extent this is because such an approach proved successful in the NHS and within other local authorities in the region. This strategy is nevertheless also clearly designed to utilise the ULR initiative in order to engage and develop a new cadre of activists in line with the organising model of union renewal. The Combined Unions, by contrast, have sought to add the ULR role to the responsibilities of existing activists. Indeed, all existing Union C shop stewards were instructed to become ULRs. This approach suggests that the Combined Unions have sought to position the ULR initiative, and the learning agenda more generally, within the framework of the servicing agenda.

Given the significance of learning within the servicing model, it is perhaps unsurprising that developments in relation to the learning agenda have underlined the historical rivalries between the unions. As an organising issue, learning arguably has more potential to generate mutual gains for unions in contexts where more than one union operates, and where relations between the unions in question are cordial. City Council is, however, clearly a highly competitive environment for trade unions, and the concept of unions deriving mutual gains from advancing the learning agenda does not appear to have been recognised by any of the key actors within any of the unions.

Learning as a distribution issue?

City Council has an extensive training provision for employees, and a positive approach to equal opportunities that extends to learning activities. The People Strategy thus promotes the use of ULRs to ensure council-wide accessibility for basic skills training. It also outlines a target of a 5 per cent year-on-year increase in the number of employees accessing basic skills training until 2008. Yet, despite these measures, the majority of training appears to be directed towards managerial and white-collar staff, with manual workers and part-time employees having fewer opportunities to engage in learning activities. In the past the unions sought to address this issue in principle through existing bargaining frameworks; more recently, however, their involvement in processes such as liP provided an additional opportunity to raise issues relating to the distribution of training opportunities, and indeed the Minimum Learning Entitlement emerged from the liP accreditation process. In theory, the SPF established by the learning agreement provides a dedicated forum where access issues could be raised. However, as this forum meets irregularly, and is rarely attended by corporate-level managers, the unions have continued to utilise the existing bargaining machinery and informal discussions with key human resources personnel to advance their concerns about the distribution of training opportunities. They have had some success, with the Policy for Time Off for Essential Skills currently being developed. As well as seeking to address access issues in principle, the unions have also sought to tackle these in practice, by negotiating release for individual employees with their managers.

The development of an effective ULR network could clearly be utilised to ensure that a greater proportion of employees took advantage of the Minimum Learning Entitlement, yet a Union C representative indicated that the potential of this initiative was not being realised. This reflects not only the difficulties the unions have faced in recruiting ULRs, but also that the ULRs that do operate are concentrated in areas dominated by male, manual employees. Fewer ULRs

represent female part-time employees, and so there has been little headway in engaging such workers in learning activities.

All issues relating to the relationship between remuneration and skills acquisition are addressed within traditional bargaining frameworks, or by policies and procedures such as appraisal and job evaluation, which the unions were involved in developing. The unions have not, however, sought to raise the issue of remuneration in relation to skills acquisition facilitated by the Learning Centre. This is largely because the Learning Centre does not provide vocational training, but also because the internal labour market provides a mechanism for rewarding skills acquisition.

The learning culture and performance outcomes: business benefits?

Some hundred employees have now undertaken basic skills and IT courses within the Learning Centre and there is some suggestion that an embryonic learning culture is beginning to develop at the Town Depot where the centre is located, and where managers are committed to the learning agenda. Certainly the drop-in sessions available at the centre have encouraged a broader view of what constitutes learning, and who can engage with learning activities:

“It’s helped us move away from the idea that learning takes place between nine and five in a classroom. It’s helped manual workers realise that learning is for them, not just for the office staff. It’s a little ripple. It’s not enough yet, but it’s better than nothing.”
(City Council management representative)

It is not clear whether the learning undertaken by employees within the Learning Centre has enabled them to improve their performance within the workplace, or whether this has impacted upon service delivery. It is, however, important to note that the Learning Centre does not provide vocational training, and indeed was not established in order to impact directly upon employee or organisational

performance. Some employees appear to have gained confidence as a result of their learning experiences, yet the possibility of this being translated into improved performance by further training of a more vocational nature would appear not to be widely acknowledged, even within the human resources function:

“One guy from street cleansing came to the learning conference and spoke about his learning experiences. He’d have never done that before. But that doesn’t improve the performance of the organisation to be honest. If he hadn’t have done that, the work would still have been done.”
(City Council management representative)

Many directorate-level managers with operational roles also appear to be highly sceptical of the organisational benefits to be gained from basic skills initiatives:

“I’ve heard it all the time: ‘I don’t need my street sweepers or my gardeners to be able to read. Why do you keep pushing this?’”
(City Council management representative)

Such attitudes are disappointing but perhaps unsurprising, given the performance management framework within which local authorities operate, and the tensions faced by managers seeking to balance the need for effective service delivery with their responsibilities for human resource development.

The conclusion of the learning agreement has nevertheless generated significant benefits for City Council, as it has contributed to positive Comprehensive Performance Assessments and IiP accreditation, both of which serve to improve the corporate image of the organisation:

“The IiP assessors loved it [the learning agreement]. If I were going to sell learning agreements to another council I’d do it on the basis that it helps towards IiP.”
(City Council management representative)

Summary

According to one management representative, the learning agreement developed by City Council and the non-teaching unions is “more symbolic than significant”. There appears to be some truth in this. The legislative and regulatory framework governing the activities of local authorities has created significant pressures for restructuring and redundancies and, as a result, traditional bargaining agendas continue to be prioritised by both management and the unions, with relations between the parties being largely characterised by hostility and suspicion. Because of this, and the failure of the unions to recruit and retain more than a handful of ULRs, the procedural elements of the agreement are largely moribund.

Further barriers to the success of the agreement are represented by the low skills base of the ULRs that have been recruited; the rejection of the concept of partnership by Union B; the resilience of inter-union rivalries; and the apparent inability of some directorate-level managers to position learning within the framework of broader strategic objectives. Yet, despite this, a partnership-based approach to learning involving City Council and the Combined Unions has begun to develop largely because the learning agenda has been positioned within a framework for mutual gains by a number of key individuals. This approach has facilitated the establishment of the Learning Centre, and the provision of basic skills and IT courses for a section of the workforce, which, though small, had few opportunities to engage in workplace-based learning in the past. These activities have in turn resulted in the development of a fledgling learning culture within the Town Depot, and in improved relations between management representatives and the Combined Unions.

The significance of the learning agreement is that it provides a framework for the development of a partnership-based approach to learning throughout the organisation. Its symbolism arguably comes from the fact that, though largely moribund, it has nevertheless contributed to City Council receiving positive Comprehensive Performance Assessments and IiP accreditation.

Case study three: DistribuCo (Northernton depot)

The context

DistribuCo is a major transnational logistics company providing supply chain solutions and distribution services to 75 per cent of the world's largest non-financial companies. The company has over 51,000 employees in the UK based at 600 locations. The Northernton depot currently forms part of the supply chain for a well-known high street retailer, and supplies 12 distribution centres, which in turn supply over 300 retail outlets; 156 people are currently employed at the Northernton site. The majority of employees are members of the recognised union, Union D, although there is also a small Union E presence on site.

Recent developments in relation to the learning agenda at the Northernton depot have been trade union led from the outset, having their genesis in the activities of a Union D branch official whose interest in learning issues was aroused by attendance at various Union D courses and TUC Learning Services events. Senior managers at the depot acknowledge the central role played by the union, and indicate that their willingness to allow key Union D officials to take the lead in the development of both the learning agenda and the learning agreement has, to some extent, reflected their need to prioritise operational concerns.

“X[Union D representative] is keen on learning agreements and he's pushed it to be honest. Without him nothing would have happened. We haven't the time to deal with these sorts of issues.”
(DistribuCo Northernton management representative)

Existing patterns of industrial relations within DistribuCo and at the Northernton depot have perhaps had a more significant bearing on the role played by Union D in the development of the learning agenda at Northernton. DistribuCo has an extensive corporate-level training and development facility, yet local managers nevertheless have considerable autonomy in relation to the development of site-

based learning initiatives. Against this backdrop, relationships between management and Union D at Northernton have traditionally been harmonious, and high-trust relationships have evolved between key individuals, enabling learning to be positioned within a framework for mutual gains:

“At DistribuCo Northernton... there's good industrial relations there anyway. We have a very experienced shop steward who has a good relationship with the employer and there hasn't been a major problem at all with anything that's gone on in terms of union learning there. There's been green lights given by the employer.”
(Union D ULF project worker)

Despite the emphasis placed on training and development at corporate level within DistribuCo, a significant proportion of Northernton employees nevertheless have basic skills needs. Both management and Union D representatives acknowledged that addressing those needs could facilitate improvements in employee performance, thus generating business benefits, although Union D representatives also highlighted the importance of learning as a route to increased employability for such workers.

Equally significantly, the advancement of the learning agenda at Northernton was seen as having the potential to generate mutual benefits, because this represented a response to implicit pressures from other employers within the supply chain who emphasised the importance of staff development. In this context then, a learning agreement could be presented as evidence of a commitment to staff development, which could be utilised within broader strategies to retain or win contracts:

“That's what that agenda's about, so that they can turn round to the likes of those companies and say 'We should have your contract next time because we look after our employees'... Some of the better, or, I wouldn't say necessarily even better, but the likes of Marks & Spencer of this world who say

‘OK, we’ve got an image to protect’... We can’t be seen to be working with dinosaurs, we need to be seen to be working with people who are up to speed with things like HR, personnel issues, with discrimination issues, with health and safety and with this learning agenda.”
(Union D ULF project worker)

A further impetus for the development of the learning agenda at Northernton, and particularly for Union D’s leading role within this, was provided by the availability of ULF monies that could be used for workplace-based learning initiatives. Indeed, ULF funding obtained by Union D is being utilised to develop a workplace learning centre, and a number of taster sessions have been arranged in conjunction with a local college.

The nature and scope of the learning agreement

Because of the high-trust relationships that exist between senior managers and Union D officials at the Northernton depot, and the positioning of learning within a mutual gains framework, management to a large extent adopted a hands-off approach to the development of the learning agreement. Certain stipulations were made, such as that this must apply to all employees irrespective of their trade union affiliation; and managerial support for the development of the learning centre was similarly dependent upon a number of provisos, notably that the operation of this facility would be sensitive to operational priorities, and that the centre would not be used as a vehicle for the provision of trade union education. The role of management has nevertheless focused on monitoring rather than controlling developments in relation to the learning agenda:

“It’s just a case of ensuring that liberties aren’t being taken, to be honest.”
(DistribuCo Northernton management representative)

Representatives from the corporate-level human resources function were aware that a learning agreement had been discussed at Northernton, and insisted that this should be a formal agreement, rather than an informal arrangement, because of concerns that informal arrangements were more open to abuse that could impact negatively upon employee performance and business efficiency. Union D also favoured a formal agreement, though the rationale in this case was that such an agreement would make the partnership-based approach to learning more sustainable in the longer term, especially given the short-term nature of ULF funding.

Neither corporate-level nor plant-level managers were involved in the drafting of the learning agreement itself. This was prepared by Union D branch officials,¹⁴ Union D ULF project workers and representatives from a local further education college, before being presented to senior managers from the Northernton depot for approval:

“The truth of the matter is that once we’d decided what was going in the agreement we just asked management to come in and sign it. We started the meeting at ten o’clock. We called management in at 5 to 12, and by 12 o’clock we were down for butties.”
(DistribuCo Northernton trade union representative)

The learning agreement, which was concluded in August 2005, applies only to the Northernton depot, although it is possible that employees at two nearby depots will be invited to use the learning facilities that are being developed. The learning agreement is a single-purpose agreement designed to operate alongside existing bargaining arrangements. It comprises a broad framework document that formalises the role of the ULRs, and commits management and the ULRs to a partnership-based approach to learning. Union D representatives favoured the development of a framework agreement

¹⁴ The Union D branch officials were also acting in their capacity as the ULRs for the Northernton depot.

because, while this had the ostensible purpose of formalising the principles of partnership working, it also provided a flexible foundation upon which substantive agreements in relation to learning could be subsequently constructed:

“It’s more a framework really, rather than putting the specifics down. If you put too many specifics down... you set things to aim for, but you can’t add things later.”
(DistribuCo Northernton trade union representative)

The agreement does, however, have a procedural element, and thus provides for the establishment of a Learning Partnership Committee (LPC), which has responsibility for introducing, implementing and monitoring learning initiatives at the depot. The agreement stipulates that management and the trade unions will have equal representation on the LPC, and that all sections of the workforce will similarly be equally represented. The LPC, then, provides for trade union involvement in the development of the learning agenda to be formalised and embedded, and thus provides the foundations for the development of a partnership-based approach to learning. These foundations have yet to be built upon, however, as members of senior management have been reluctant to engage with the LPC, which has yet to meet as a consequence. The position of management in relation to the LPC represents a response to delays in the development of learning facilities. The learning centre took more than twelve months to develop, and one management representative indicated that there were concerns that this level of delay might lead to disillusion among members of staff keen to access the facilities. The comments of another management representative, however, suggest that the temporary withdrawal of management support for the LPC is part of a broader strategy to distance the company from the development of the learning agenda, in order that the union would be held responsible if the planned learning initiatives were to fail:

“As [Union D] are making the running it will be them that are blamed in the event of failure.”
(DistribuCo Northernton management representative)

This approach may to some extent reflect the influence of the corporate human resources function, as concerns were expressed about the efficacy of learning centres by the human resources director, who had previous experience of learning centres that had failed. The apparent unwillingness of senior managers at the Northernton depot to share the risks associated with developing the learning agenda nevertheless raises questions about the degree to which their commitment to a partnership-based approach to learning can be considered to be genuine. An alternative interpretation may be that shouldering the responsibility for potential failure may be an acceptable trade-off for Union D, given the freedom the union has had to develop the learning agenda.

The learning agreement does not contain any substantive clauses, though a number of informal substantive agreements relating to learning were negotiated by senior management and Union D prior to the conclusion of the learning agreement itself. It was thus agreed that the two ULRs would be able to spend four hours per week on union activities without loss of pay. In practice, however, there are few restrictions on the amount of time the two ULRs are able to utilise. To some extent this reflects the hands-off approach adopted by management in relation to the development of the learning agenda, though it is also significant that the two ULRs also hold positions both as branch officials, shop stewards and health and safety representatives, and are thus able to cross-subsidise their union activities:

“If we say we need to spend time... we could just say we’re doing union business and we could be up here [in the learning centre] all day. Nobody would be bothered.”
(DistribuCo Northernton trade union representative)

Another informal substantive agreement relates to time off for learning. Employees are thus able to utilise two hours of their working week for learning activities, providing they match this with their own time. Union D branch officials are also hoping to negotiate an agreement that would allow employees to attend basic skills courses in company time.

Learning and the broader industrial relations environment: trade union–management relations

Although both Union D and Union E have members at the Northernton depot, only Union D, which represents the majority of unionised employees, is recognised for bargaining purposes.¹⁵ Historically, relations between management and local Union D officials have been conciliatory, and there have been no major disputes during the last two decades:

*“There’s never been any head butting here.”
(DistribuCo Northernton management representative)*

Both management and Union D representatives indicated that the learning agreement had had little impact upon this broad pattern of industrial relations. Somewhat ironically, however, the learning initiative that is being developed was almost derailed prior to the conclusion of the learning agreement as a result of the involvement of full-time Union D personnel. An indiscreet comment made by a Union D ULF project worker¹⁶ at the end of a preliminary meeting suggesting that the learning agenda represented an opportunity for employees to get even with the company, resulted in senior management representatives being initially reluctant to commit to the initiative, despite being supportive in principle. Local Union D branch officials were able to overcome

these difficulties by positioning the learning agenda within a framework for mutual gains. This approach was endorsed by senior managers at the depot, and as a result communications between management and branch officials have improved, even given the tradition of harmonious industrial relations:

*“The learning centre is reducing the gap between them and us... When I’m going to a meeting about wages I put a different hat on. When you talk about learning you talk about what the employees want and what the company wants. When you talk about wages you’re not bothered what the company wants... I wouldn’t go in [to discuss issues related to the learning agenda] with the same attitude. You go in as friends.”
(DistribuCo Northernton trade union representative)*

It is nonetheless significant that the learning agreement was regarded by management representatives as evidence of good industrial relations at the depot, which, like a commitment to staff development, could be utilised within broader strategies to win contracts from other companies:

*“We don’t have that many issues here, and the learning agreement hasn’t changed that... but the learning agreement is something we can produce to show how we can work together if there was ever a need for this.”
(DistribuCo Northernton management representative)*

Both management and Union D representatives suggested that the advancement of the learning agenda at the Northernton depot had had no impact upon broader bargaining agendas. This was attributed to learning being consciously divorced

¹⁵ DistribuCo has different arrangements for trade union recognition at each depot, with recognition usually being granted to the union representing the majority of organised workers; thus at the nearby Middleton depot recognition has been granted to Union E rather than Union D.

¹⁶ This particular project worker was not involved in developing the learning agreement at the Northernton depot, and is no longer employed by Union D.

from wider bargaining issues by both management and Union D representatives, although it was acknowledged that this approach was to some extent necessitated by the structure of existing bargaining arrangements within the company. Traditional bargaining concerns fall within the remit of the National Negotiating Committee (NNC),^{17,18} which covers the whole of DistribuCo's retail logistics division. However, this forum has no mandate to consider learning, as this issue is considered to be the prerogative of the corporate human resources function. In practice, then, the autonomy afforded to local managers means that issues relating to the learning agenda are often considered informally at local level, with site-based learning initiatives being dependent on the commitment of local managers and key trade union representatives.

Inter- and intra-union relations

Union D and Union E both have members at the depot; however, relations between the two unions are extremely poor:

“There is no relationship between Union D and Union E. They are quite antagonistic towards each other.”
(DistribuCo Northernton management representative)

This in part reflects the differing approaches towards industrial relations issues that have been adopted by each union locally for, while Union D places significant emphasis on partnership-based approaches to labour relations issues, Union E appears to favour a less accommodative approach. Tensions between the two unions have also emerged in relation to the issue of recruitment. This is a matter of particular significance within DistribuCo, given that the company grants recognition on a local basis to the union with the largest number of members. Against this backdrop, Union D and Union E have each accused the other of poaching, with the TUC having recently investigated

a formal complaint made by Union D in relation to Union E activities at Northernton.

The development of the learning agenda has not served to improve relations between Union D and Union E. To a great extent this is because Union D branch officials have sought to develop the learning agenda unilaterally, an objective that has been facilitated by Union E not being recognised at Northernton. Union E representatives consequently had no involvement in formulating the learning agreement. Equally significantly, the agreement commits the ULRs operative at the depot – rather than the unions – to a partnership-based approach to learning. As both ULRs that operate at the depot are organised by Union D, then, the learning agreement represents a de facto single-union learning agreement between Union D and DistribuCo at the Northernton depot.

Given the nature of the arrangements for trade union recognition within DistribuCo and the significance of learning within the servicing agenda, it is to some extent unsurprising that the issue of learning has underlined inter-union rivalry. As an organising issue, however, learning arguably has the potential to generate mutual gains for unions, and may therefore represent a basis for partnerships between unions at workplaces where more than one union operates. This concept appears to be recognised more broadly within Union D, and Union D project workers have consequently sought to involve other unions when developing ULF projects. As yet, however, this approach has seemingly not gained acceptance among Union D branch officials at Northernton:

“There's a bit of history there, but I think once this starts rolling through and they see the certificates appearing they'll bury the hatchet. I think it was X's [the Union D branch secretary] reluctance to have foreigners [Union E members] in his learning centre.”
(Union D ULF project worker)

¹⁷ One of the Union D branch officials is a delegate to the NNC.

¹⁸ All the unions recognised at site level are represented on the NNC.

Union E members, alongside employees without trade union affiliation, will have access to the learning centre that is being developed at the depot only because managerial support both for this initiative and for the learning agreement was dependent upon this. For the same reason, employees at the nearby Middleton depot will also be able to use the Northernton facilities. Middleton employees are, however, organised by Union E, and a management representative indicated that tensions between the two unions had the potential to limit the use of the learning centre by Middleton staff. It is an apparent paradox that this was seen as something of an advantage from a managerial perspective, because it would lessen the impact of the initiative on the business:

“Middleton people prefer to work with their own union rather than with Union D people... That kind of works for us, because Middleton is three miles away, and we can’t afford to have them coming here.”
(DistribuCo Northernton management representative)

This approach, however, perhaps reflects the tensions faced by managers attempting to balance the competing demands represented by business priorities and staff development.

Learning as a distribution issue?

DistribuCo has an extensive human resource development function, and the Northernton depot achieved liP accreditation in 2004 as part of a corporate award.¹⁹ However, a number of senior management representatives indicated that the impact of liP on training provision at the depot should not be overstated:

“liP didn’t really leach into training. It’s more evident in terms of staff appraisals, improved communications and better relations with staff... Training falls by the wayside. You do all sorts of things in the process of getting accreditation, but once you’ve got that standard... that’s unsustainable...”
(DistribuCo Northernton management representative)

Employees engaged in blue-collar occupations at Northernton appear to have fewer training and development opportunities than those employed in white-collar and managerial positions. Indeed, many such employees have still to receive basic induction training, despite the company making a commitment to mainstream this as part of its efforts to gain liP status. Union D branch officials recognise that training and development has the potential to be positioned as an equal opportunities issue, but they have not, as yet, made any attempt to link training and development with broader distributive agendas. While this may, to some extent, reflect the absence of a formal arena in which such issues can be raised (the NNC having no remit to consider learning), it also stems from the learning initiative at Northernton being at a very early stage of development. The immediate focus of Union D activities is therefore to raise demand for learning among blue-collar employees in particular, since at present the greatest interest in learning activities is evident among white-collar and supervisory staff.

While Union D branch officials consider bargaining over access to employer-sponsored learning and career development opportunities to be inappropriate at this point, they nevertheless indicate that this may become a feature of discussions with management in the future. Indeed, the current learning initiative is regarded as having the potential to facilitate such developments, since employee use of the learning

¹⁹ liP was awarded to DistribuCo’s retail logistics division.

centre will provide evidence of employee commitment to learning and personal development, and therefore a platform for such discussions.

Union D branch officials have similarly not sought to link learning and skill formation with reward systems as yet. This may also be related to the learning initiative being at an early stage of development and the emphasis that has been placed upon the consensual aspects of the learning agenda. It may, however, also reflect recognition among Union D officials that attempts to link learning with reward systems, and with remuneration in particular, are not likely to be successful because these issues are regarded as an area of managerial prerogative:

“If X [the Union D Branch Secretary] had approached this from a remuneration point of view he would have hit a wall very quickly.”
(DistribuCo Northernton management representative)

The learning culture and performance outcomes: business benefits?

The recent emphasis placed on the learning agenda has not, as yet, led to the development of a discernible learning culture at the depot. This is perhaps unsurprising given that the learning centre has been operational for only a short period, with few employees having the opportunity to use the facilities; but a senior management representative indicated that the development of a learning culture is in any event not a managerial priority:

“I wouldn’t say we’re a learning organisation. We have to be very careful. We have to remember what we’re here for, and that’s to make money. We’re receptive to learning as long as this fits with the mission of the company.”
(DistribuCo Northernton management representative)

Management representatives, like Union D branch officials, acknowledged that learning has the potential to generate business benefits in the form of improved

employee performance, increased flexibility and adaptive behaviour, and better succession planning, but, because the learning partnership is in its infancy, such benefits have yet to be realised. Yet, according to one senior management representative, employee morale at the depot has improved as more emphasis has been placed on learning, with this being attributed to employees regarding the opportunity to learn as a reward:

“I was very surprised at the interest [in the learning initiative], to be honest. Some of the staff have been here for 30 years and are resistant to any sort of change... Allowing them to learn is a reward. This affects morale. It’s a bit of a morale boost.”
(DistribuCo Northernton management representative)

Another management representative, however, cautioned against attributing improvements in morale wholly to developments in relation to the learning agenda, as a number of initiatives introduced as part of the process to gain liP accreditation, such as staff briefings and staff appraisals, had also had a positive influence upon employee attitudes.

The adoption of a partnership-based approach to learning has nevertheless generated business benefits in unexpected quarters. The conclusion of the learning agreement with Union D in particular has generated positive publicity for the company, enabling it to demonstrate a commitment to staff development and thus present itself as a good employer to potential clients:

“There’s kudos in publicising a learning agreement... even though the learning initiative is at a very early stage of development.”
(DistribuCo Northernton management representative)

This agreement has similarly enabled the company to evidence the tradition of harmonious industrial relations at Northernton, something that can again be utilised within broader strategies to win business.

Summary

The development of a partnership-based approach to the learning agenda at the Northernton depot has, to a large extent, been facilitated by existing patterns of industrial relations at the site, since the high-trust relationship between senior managers and Union D officials have enabled the learning agenda to be positioned within a framework for mutual gains. The high-trust relationship has similarly made it possible for Union D to take a leading role in developing the learning agenda.

Union D has accrued significant benefits from these developments. The role of branch officials in developing the learning agenda, and in concluding the learning agreement at the depot, has enabled the union to increase its profile on site. Furthermore, the LPC established by the learning agreement may yet enable the union to extend its influence in relation to broader training and development issues. The conclusion of a de facto single-union learning agreement has arguably also enabled Union D to underline its position as the dominant union at the depot. It remains to be seen whether Union D can extend its influence in relation to other bargaining issues on the strength of its commitment to a partnership-based approach to learning. Two factors may militate against this: first, broader industrial relations issues fall within the remit of the NNC, which covers the whole of DistribuCo's retail logistics division; second, and relatedly, other unions with different approaches to traditional bargaining issues represent DistribuCo employees.

The partnership-based approach to learning adopted at the depot, and particularly the conclusion of the learning agreement, has also had a number of positive outcomes for the company. These have been most evident with regard to public relations, since the learning agreement can be used to demonstrate not only that the company is committed to staff development, but also that the depot enjoys harmonious industrial relations, such factors being pertinent within the context of strategies designed to attract business from major employers with progressive approaches to such matters. The recent emphasis placed on learning has also contributed to improved employee morale at the depot, and although the learning initiatives at the depot are at an early stage, this may yet be translated into improved performance.

Case study four: NautiCo

The context

NautiCo is a subsidiary of NautiCo Group, a UK-based company that employs 14,000 staff worldwide in order to provide a wide range of products and services to the defence, marine, offshore and aerospace sectors. Some 1,000 workers are employed by NautiCo itself, which designs and constructs warships for the Royal Navy and overseas markets, and also manufactures smaller nautical craft for both military and commercial customers.

By the end of the 1990s the future of the UK shipbuilding industry was uncertain and NautiCo faced a number of major challenges. Chief among these was the need to develop capacity and increase productivity in order to both win and deliver on orders. Yet technological developments within the sector, such as computerised numerical control (CNC) cutting and automated welding processes, had highlighted significant skills gaps among an increasingly ageing workforce, many of whom had basic skills needs having been recruited as school leavers. It was also proving increasingly difficult to address skills shortages through recruitment, as the image of shipbuilding as an unattractive career choice remained resilient despite technological change and the efforts of the company to dispel such perceptions within local schools and institutes of further and higher education.

Concerns relating to skills shortages were shared by the unions operating in the company, and as a consequence three agreements relating to skill formation were concluded between 1998 and 2002 within the framework of existing bargaining arrangements. The Modern Apprenticeship (MA) Agreement thus links the MA to the existing remuneration system, with students joining the company apprenticeship scheme at the end of the first year of college-based training, and receiving 75, 90 and 100 per cent of the Tradesman Rate at the end of the second and third years of training and on attainment of the qualification respectively. The Agreement on Recruiting and Training Trainee Welders provided for the employment of welder

trainees in addition to the normal intake of MAs, with training progression again being linked to the existing remuneration system. While both these agreements were designed to increase recruitment, the Adult Training Agreement focused on up-skilling the existing workforce by providing an opportunity for employees qualified to NVQ Level 2 to achieve a Level 3 qualification and enter the craft trades. Despite these strategic developments, investment in training nevertheless remained “woefully low”, and there was no systematic approach to the allocation of the training budget, which was usually dispensed on a simple first-come, first-served basis:

“It was completely ad lib. Once the training budget was exhausted that was it.”
(NautiCo management representative)

The issue of skills shortages was graphically underlined when the company won a number of major orders to supply warships to the Royal Navy, since these undertakings increased the demand for skilled labour, with estimates suggesting that the company would need to recruit an additional 320 MAs as well as 300 adult trainees.

The availability of public funding for union-led workplace learning initiatives through the ULF alongside the provision of statutory recognition for ULRs under the terms of the 2002 Employment Act provided a major catalyst for the development of a partnership-based approach to the learning agenda within NautiCo. This was initially manifest in the development of the successful ULF bid by the five unions operating within the company under the collective banner of the Nautical and Marine Unions (NMU), which was supported by the company and the local college of further education. The ULF project, which was union-led from the outset, ran initially from February 2002 until May 2003, but was extended until August 2005 by a subsequent bid. The project facilitated the development of a workplace learning centre, providing basic skills and IT courses for NautiCo employees, and led to the establishment of a network of trained ULRs drawn from all the recognised

unions. The ULF project also provided the impetus for the development of a learning agreement between NautiCo and the NMU, since the project bid stated that this would be a project outcome.

The nature and scope of the learning agreement

Senior NautiCo managers were prepared to support both the ULR initiative and the union-led learning project because it was perceived that such an approach, combined with the availability of non-vocational courses within the learning centre, would be more likely to encourage the large number of employees with little experience of post-compulsory education to engage with learning activities. Management therefore adopted a largely hands-off approach to the development of the learning agreement, which was drafted by the first group of ULRs to be trained. The draft was subsequently agreed with senior managers with only “minor changes” and was finalised in July 2002.

The learning agreement is in essence a framework document that commits NautiCo and the unions to build a learning partnership within the company in order to derive mutual gains from engaging employees in lifelong learning. For this reason the agreement is designed to be a stand-alone arrangement that operates alongside existing bargaining machinery. It does, however, provide for disputes in relation to learning to be subject to the existing grievance procedure. This is significant, representing recognition that the learning agenda does not always represent consensual territory for employers and trade unions.

The agreement has a procedural element as it provides for the establishment of a Learning Partnership Steering Committee (LPSC) to be comprised of the ULF project manager,²⁰ ULRs,

management representatives and representatives from the learning providers. The LPSC has a broad remit that includes identifying and prioritising the learning needs of employees; maintaining the learning centre; monitoring the achievements of learners; and overseeing contracts with external stakeholders such as learning providers and the DfES. Most importantly though, the learning agreement charges the LPSC with responsibility for the development, implementation and monitoring of a learning plan for the workplace. This then underscores trade union involvement in the development of the strategic approach to learning within NautiCo, especially since all the ULRs operating within the company also hold positions as shop stewards within the unions affiliated to the NMU. This in turn has enabled the unions not only to take a leading role with respect to the learning agenda, but also to have an increasing influence in relation to broader human resource development issues.

This can be illustrated by the acceptance by management of union proposals to introduce core training for leading hands and chargehands.²¹ Historically, employees were ‘made up’ to leading hand by managers on the basis of subjective assessments of their suitability, yet these decisions were based on an assumption that such individuals already had the necessary competences to undertake the administrative functions related to this role, when this was often not the case:

“We had members complaining that they couldn’t work the PCs when they were made up to leading hand or chargehand. It was automatically assumed that they could operate the PC; write a letter; write a report, but most of the lads had never done this sort of thing before. Some of them had never used a computer, they didn’t know how to turn it on.”
(NautiCo NMU convenor)

²⁰ The NMU convenor.

²¹ First line supervisory grades.

Funding from TUFSE²² was obtained by the NMU in 2004 to enable the learning centre to provide a core programme of numeracy, literacy and IT training for leading hands and chargehands.²³ In tandem with this, however, these positions became permanent rather than temporary posts and were filled on the basis of a competence-based application process rather than by appointment.

Significantly, the learning agreement also contains a number of substantive points. It thus provides for employees to receive full paid release for basic skills courses, and 50 per cent paid release for IT courses. Employees are also entitled to receive full release time to attend basic skills assessments. These substantive clauses were later supplemented by a number of informal substantive agreements. As a result of one such agreement, full paid release is now provided for all courses undertaken by employees in the learning centre. Another informal arrangement provides for employees progressing from courses completed in the learning centre to job-related training with local providers to have any course and/or examination fees reimbursed by NautiCo on completion.

According to a number of ULRs, the learning agreement has contributed to the sustainability of the learning partnership that has developed within NautiCo, this being demonstrated by the continuing emphasis placed on the learning agenda within the company despite ULF and TUFSE funding having ceased more than twelve months ago. Within this context, the continued support of senior managers for the agreement is crucial and indeed appears in some respects to have increased the bargaining power of the unions with regard to the learning agenda. This is because the unions have been able to utilise the position of senior management in order to secure the cooperation of middle managers and supervisors for activities designed to advance this.

Learning and the broader industrial relations environment: trade union–management relations

Relations between management and the trade unions within NautiCo have improved significantly in recent years, with this being attributed in part by both management and union representatives to the emphasis placed upon the learning agenda and the capacity of this to deliver mutual gains:

“We’ve gone away from the confrontational union–management relationship, and the learning agenda has really helped in that respect. We have our moments, but nowhere near like we used to.”
(NautiCo management representative)

Within this context, the mechanism of ULF funding appears to have been particularly important since this has provided an impetus for the development of a partnership-based approach to learning:

“The ULF project pushed us down the road to partnership, because the deliverables and outcomes were all dependent upon the support of the employer and the local providers.”
(NautiCo NMU convener)

Yet developments in relation to the learning agenda have taken place against the backdrop of a significant change in NautiCo’s product market strategy. Declining order books at the end of the 1990s prompted management to abandon the approach of tendering for all possible work, and adopt an alternative strategy in which bids were made only for contracts that the company was believed to have a strong chance of winning:

“We used to tender for everything that was going, maybe putting in ten or twelve bids a year. Now we look at maybe two that we have a good chance of getting.”
(NautiCo management representative)

²² Trade Union Fund for the South East, a local initiative introduced by the Learning and Skills Council to supplement the ULF.

²³ TUFSE provided £30,500 for this initiative, with NautiCo contributing an additional £78,937 – giving a total investment of £109,437.

This targeted approach has proved successful, since the company won a major contract to build large sections of six Type 45 destroyers for the Royal Navy, in addition to an order for the construction of 20 per cent of two new-generation aircraft carriers. The company is also the preferred bidder to build three corvettes for the Omani navy, and a number of smaller commercial projects are due to come on line in the near future. Order books are therefore full for the next ten to twelve years. Changes in product market strategy were, however, accompanied by a major business process re-engineering (BPR) exercise that has seen the introduction of High Performance Working Practices and major changes in the broader industrial relations environment within the company.

In order to have the capacity to deliver the contract for the Type 45 destroyers, NautiCo moved its operations from the existing 100-year-old yard to purpose-built facilities, which represented a £50m investment. The move to the new facilities was accompanied by significant reductions in personnel and widespread changes to work organisation, with the shop-based system in operation at the old yard being replaced by large production halls. This facilitated the introduction of integrated workflows, automated processes and functionally flexible teamworking, with these changes themselves generating new skills needs.

The proposed move to the new facility precipitated industrial action by the unions, which were seeking the introduction of a four-day working week to reduce the travelling time for the remaining employees,²⁴ a demand that was eventually met, with NautiCo also providing subsidised transport. These developments reflected the industrial relations culture at the old yard, which was characterised by relatively antagonistic relations between management and the unions. There was, however, growing recognition among both management and union representatives that a hostile industrial relations climate was counterproductive to the strategic objectives of increasing productivity and competitiveness against

the backdrop of global competition. As a result, the move to the new facility was also accompanied by concerted efforts to change the organisational culture of the company:

“We decided to get away from the old command and control system.”
(NautiCo management representative)

This objective was facilitated by delayering within the management structure, resulting in the loss of 163 directors and middle-management posts, and was manifest in greater emphasis being placed on communication in an attempt to establish high-trust relationships with employees and the unions. Certainly the unions are now party to more commercial and strategic information than was previously the case:

“They [management] listen a bit more now. Communication is better. I get told things from the management side now. Sensitive things that I wouldn’t have been told a few years ago.”
(NautiCo ULR)

The company has also sought to introduce employee involvement practices in order to promote innovation and utilise the skills and knowledge of the workforce to better effect:

“We’re trying to encourage innovation. People on the job know best about how it should be done.”
(NautiCo management representative)

Exemplifying this approach, leading hands and chargehands were given more responsibilities, in recognition of their expertise in relation to the production process:

“They were empowered to make decisions. They’re the ones who know if the job’s running right or not, and they know how to sort things out.”
(NautiCo NMU convener)

²⁴ Although the new facilities were only 15 miles from the old yard, many employees lived in its immediate locality and were thus accustomed to walking to work.

The introduction of employee involvement practices have been buttressed by the development of a more coherent approach to human resources management, which has focused on increasing the skills of employees, and linking skills acquisition with opportunities for promotion and career advancement. Indeed, a number of employees have been promoted following completion of courses in the learning centre or with external providers.

It is clear that the advancement of the learning agenda has underpinned the introduction of High Performance Working Practices within NautiCo. Yet there has been a multi-directional relationship between these practices and the learning agenda because employees have been empowered to take responsibility for their own learning and are consequently more confident in challenging managers about their training needs:

“People are now willing to go to their manager and say: ‘I need this training to do the job’. Before they would have just shrugged their shoulders and said: ‘I can’t do that [task]’. They’re more confident and more pro-active.”
(NautiCo NMU convenor)

In some respects the development of a partnership-based approach to learning can also be seen as a manifestation of efforts both to change the organisational culture within the company and to increase employee involvement. Because of this, questions perhaps remain as to whether management strategy towards the unions is designed to result in a partnership-based approach to broader industrial relations issues, or in the development of a shared unitary perspective. In any event, trade union activities in relation to learning have served to generate more positive perceptions of the unions among senior management. In part this is due to recognition that key union representatives have developed a significant level of expertise in relation to the learning agenda and therefore represent an additional resource that the company can draw upon, but it also reflects the ability of the unions to draw

down funding in order to develop learning facilities and provide learning opportunities for employees:

“They’ve recognised that we can deliver something they can’t.”
(NautiCo ULR)

Inter- and intra-union relations

Although disputes between the unions were a feature of industrial relations in the past, this has not been the case since pay differentials were reduced during the 1980s. All the unions operating within NautiCo are affiliated to the NMU, and the shop stewards work closely in relation to traditional bargaining agendas through the operation of the Shop Stewards Committee. The recent emphasis placed upon the learning agenda appears to have made little difference to these cordial arrangements:

“We’ve never had inter-union conflicts before [the current emphasis on learning] and we haven’t had since.”
(NautiCo NMU convenor)

A number of factors have contributed to good relations between the unions in relation to learning. First, when the trade unions began to recruit ULRs, a collective decision was taken that this role would be assumed by the shop stewards. This approach was designed both to lend credibility to the learning initiative, and to establish learning as an appropriate arena for trade union activity in the eyes of the workforce, but has had the added advantage of not disturbing existing relationships between the stewards by the introduction of new personnel. Second, because union density among blue-collar staff is already approaching 100 per cent, the learning agenda has not been utilised within strategies for union renewal. Trade union activity in relation to learning has therefore been firmly focused on supporting processes designed to improve the competitiveness of NautiCo, in order to safeguard and ultimately expand employment levels within the company, while also increasing the employability of members within broader labour markets. Inter-union cooperation has also been underscored by the

mechanism of the ULF, which has been particularly encouraging of collaborative bids in later rounds. The original application for ULF funding was therefore made by the blue-collar unions under the banner of the NMU, while the second application also involved the union representing around 10 per cent of white-collar staff.

Union C and Union F have the largest number of members within NAUTICO, but representatives of all the unions were keen to stress that this had not resulted in these unions being responsible for driving forward the learning agenda in isolation. This would appear to reflect recognition on the part of key actors within all the unions that the learning agenda can form the basis for partnership between unions since the interests of the unions and those of their members in relation to learning are broadly the same:

“We don’t think of it in terms of anyone leading. We always discuss it [issues relating to learning] as a group. If something is affecting the smaller unions, it’s the same for the bigger unions and vice versa.”
(NautiCo NMU convener)

This collective approach to the learning initiative is perhaps best exemplified by arrangements in which places on oversubscribed courses in the learning centre are allocated according to a ratio based upon the proportion of the workforce organised by each union.

Learning as a distribution issue?

The relationship between skill formation and remuneration has long been a concern of the NautiCo trade unions, who have historically sought to address this issue using the existing collective bargaining framework. This approach has not changed as a result of the recent emphasis placed upon the learning agenda. Management and union representatives were, however, equally keen to emphasise that employees could also be rewarded for acquiring new skills by way of the promotion process, if the skills they gained could be transferred to the workplace and enabled them to undertake higher-level work.

The unions have similarly sought to raise equal opportunities issues in relation to learning within

the existing bargaining framework and, in providing for employees qualified to Level 2 to gain a Level 3 qualification and undertake craft work, the Adult Training Agreement addresses this issue to some degree. Significantly, the learning agreement commits management and the unions to an approach to learning that embraces the principles of equal opportunities. This has been operationalised by the learning centre, since this focuses on the provision of basic skills and introductory IT courses. Indeed, some 480 employees, representing almost half the workforce, have now participated in learning activities within the learning centre, which won the Regional Business in the Community Award for the provision of basic skills at the workplace in 2005, and was runner-up in the National Awards. The unions have not, however, sought to negotiate for a universal entitlement to time off for learning because of concerns that such an approach would be too prescriptive.

The learning culture and performance outcomes: business benefits?

There is ample evidence that the partnership-based approach to learning adopted within NautiCo, and the learning opportunities that have flowed from this, have led to the establishment of a well-developed learning culture within the company, and that this has, in turn, generated business benefits for NautiCo.

The most obvious manifestation of the learning culture is that the learning centre established by the ULF project is widely used. This can to some extent be attributed to the fact that this is a union-led initiative as the ULRs maintaining the centre have the trust of employees, and are regarded as independent of the management function. The ULRs were nonetheless aware of the difficulties of engaging non-traditional learners in learning activities, and therefore acted as role models for the workforce by being among the first to undertake courses in the learning centre.

Business benefits have been derived from the operation of the learning centre because many employees enthused and given confidence by their learning experience have undertaken further

learning more directly related to their job role in order to develop their skills. In many instances this has enabled them to embrace functional flexibility, which has contributed to improved productivity by enabling the company to make efficiency savings through the better utilisation of labour:

“You have people going on courses in the learning centre now going to do work-related courses. So, for instance, we have one lad who went on to do a course in inspecting welds, and has now taken that on as part of his role.”
(NautiCo management representative)

The training provided for leading hands and chargehands has made a particularly important contribution in this respect, since this has enabled these employees to undertake many of the functions that were formerly the responsibility of team leaders. This has facilitated reductions in the number of team leaders, but has also relieved the remaining team leaders of many of their operational functions, enabling them to concentrate on higher-level developmental work. A rate of return analysis conducted by the union representative acting as project manager for this initiative estimated that a saving of £262,764 had been generated from a total investment of £109,437, representing a rate of return of 140 per cent. Significantly, the improved organisational performance generated by training investments has enabled NautiCo managers to argue for increases in the training budget, and indeed investment in training has increased, with £1.5m being spent on training activities during 2005.

Changes in employee attitudes to learning also provide evidence of a well-developed learning culture at NautiCo. Many employees now associate learning with opportunities for career advancement, and some have utilised the courses available within the learning centre as a springboard to enter the craft trades or to gain promotion:

“[After undertaking learning in the learning centre], one of the shipbuilding production pool leading hands applied for promotion and became a chargehand, and then a team leader. So he is now in a supervisory role and has the opportunity to move into management.”
(NautiCo management representative)

Such developments have raised aspirations among the workforce more generally, which may generate business benefits for NautiCo in the future since the demand for supervisory staff is likely to rise in line with the forthcoming workforce expansion, and there are clear advantages to meeting this through internal labour markets:

“Before, people were quite happy to muddle along. They’d sit back and accept their lot. Those individuals felt they’d been left out of the system. Now they don’t, but it swings both ways because now they’re restless. They want to move on.”
(NautiCo ULR).

Significantly, the opportunities provided by the learning centre have not only influenced attitudes to learning among manual staff, but have also influenced the learning culture among first line supervisory staff. This is because employees gaining promotion as a result of utilising the learning centre have appreciated the benefits of release for training activities, and have therefore been willing to extend those benefits to staff for whom they have responsibility:

“The learning culture has filtered back up from the base, back up into the structure, because when a guy does courses in the learning centre and becomes a team leader he is more willing to let his lads go on courses themselves because he’s been through it.”
(NautiCo ULR)

While such developments can be considered to be the intended outcomes of advancing the learning

agenda within NautiCo, the company has also derived a number of unexpected benefits relating primarily to the corporate image of the company. The focus on training has meant that NautiCo has been able to position itself as a good employer within the local labour market, making it more likely that the objective of increasing apprentice recruitment will be achieved. Indeed, the company has already experienced a modest increase in apprentice recruitment. The corporate image of NautiCo has also improved because the company has been able to demonstrate that it has contributed to the development of social capital within the local community:

“There have been wider benefits. You’ve now got people who have completed courses in the learning centre going out to be school governors, for instance.”
(NautiCo management representative)

Significantly, the status of the company within NautiCo Group has also increased. Because of its success, access to the learning centre has now been made available to employees of other local operations wholly or partly owned by NautiCo Group, and the learning agreement developed at NautiCo is regarded as a model with the potential for mainstreaming in the locality.

Summary

The advancement of the learning agenda within NautiCo has enabled skills gaps to be addressed and has facilitated the extension of functional flexibility, enabling labour to be more effectively utilised. This has contributed to increasing levels of competitiveness, enabling the company to win new orders and provide a greater level of job security for employees as well as increased employment opportunities for local people. This has contributed to improvements in the image of the company within both NautiCo Group and the broader community. These developments have, to some extent, stemmed from the unions being able to take a leading role in developing the learning agenda within the context of a partnership-based approach to learning. The availability of public funding for trade union-led learning initiatives provided something of a catalyst for these developments, but cooperative relations between the unions have also been significant, since this has enabled activity in relation to learning to be firmly grounded within a framework for mutual gains.

Yet it is clear that the advancement of the learning agenda within NautiCo has been intimately linked to a management-driven BPR exercise in which human resources development strategies have been aligned with business objectives. These developments to a large extent explain why activity in relation to the learning agenda has been maintained despite public funding for the union-led initiative having ceased more than twelve months ago, and why company investment in training has increased. The sustainability of developments in relation to the learning agenda has nevertheless been made more, rather than less, likely by the presence of a well-developed learning culture within the company, and by the signing of a learning agreement that formalises the partnership-based approach to learning.

Case study five: Travelnet

The context

Travelnet is a public sector organisation providing public transport within a northern conurbation. It employs around a thousand members of staff in three areas of operations: ferries, road tunnels, and the Passenger Transport Executive (PTE), which operates a bus network and provides an administrative function.

Historically, ferries, tunnels and the PTE operated autonomously and were to a large extent regarded as discrete entities. Staff within the three areas of operations had differing local terms and conditions of employment, and there was very little contact between either management within the different areas of operations, or between the five trade unions representing Travelnet employees:

“There were three very separate organisations, with very different cultures and ways of working, and never the twain shall meet.”
(Travelnet ULR)

The structure of the company was to some degree reflected in a relatively incoherent approach to training and development. The annual training budget was utilised exclusively for job-specific training, and resources were allocated on a simple first-come, first-served basis. As a result, employee access to training was highly dependent upon whether individual managers were supportive of training and development activities; in practice “the managers that shouted loudest” got the largest share of the available budget. Many employees, particularly those engaged in manual occupations, therefore had little access to training and equally limited development opportunities. Such circumstances formed the backdrop to a critical District Auditors Report, which precipitated the recruitment of a new learning and development manager in 2002, who was charged with developing a more effective human resource development strategy.

The need for a more systematic approach to training and development had been recognised by the trade unions by the late 1990s, although their ability to

influence organisational policy at this time was minimal, since the structure of the organisation militated against the development of a co-ordinated union approach, and enabled management to play off the unions operating in different parts of the organisation against each other:

“Management used to play the different services off against each other. They’d come to us and say: ‘Tunnels and PTE have agreed to this or that so why don’t you?’”
(Travelnet ULR)

Nevertheless, reflecting the policy position of the TUC, a Bargaining for Skills project was established by a trade union official representing tunnels employees during the late 1990s.

According to both management representatives and trade union officials, the change in key management personnel in 2002 represented a catalyst for greater trade union involvement in the building of a human resources development strategy, as this led to learning being positioned within a mutual gains framework rather than being regarded as an area of management prerogative, as had previously been the case. A second catalyst for change in the approach of management to human resource development issues was provided by the availability of funding for workplace learning projects through the ULF:

“I suppose when we sat down and looked at it, and saw that we could get hold of half a million pounds we saw that there were advantages to working in partnership with the trade unions.”
(Travelnet management representative)

Such developments, alongside the provision of statutory recognition for ULRs under the terms of the 2002 Employment Act, paved the way for the establishment of a partnership-based approach to learning. This was initially manifest in the joint development of the successful ULF bid, which funded the Travelearn project. This project has enabled three learning centres providing a variety of learning opportunities for Travelnet staff to be established.

Significantly, representatives of both management and the trade unions took up posts as Travelearn project workers, while continuing in their customary roles, with both management and trade union representatives regarding this as being indicative of a continuing commitment to partnership working.

The nature and scope of the learning agreement

The learning agreement concluded at Travelnet in 2003 was jointly developed by management and the unions, though a number of key actors from each side played critical roles. Acknowledged as being “not detailed” by both management representatives and union officials, the agreement is a broad framework document that commits Travelnet to a partnership-based approach to learning, and formalises the role of the ULRs. While management initially favoured an agreement that contained more substantive elements, the unions were opposed to this. The union position reflected concerns that, given the structure of the company, and differences in the terms and conditions of employment within different areas of operations, such an approach might result in lengthy negotiations, particularly among the trade unions themselves, about minutiae that would divert attention from the principles of partnership working that they were looking to formalise:

“We wanted to gain a general consensus rather than being bogged down in the detail. Some trade unionists would have argued about a single word.”
(Travelnet trade union official)

The learning agreement is a single-purpose agreement that was designed to operate alongside existing bargaining machinery but, crucially, the agreement had a procedural element, and thus paved the way for the establishment of the Joint Learning Forum (JLF), which has responsibility for the development of learning policies and for the delivery of learning opportunities within Travelnet. The commitment to a partnership-based approach to learning is underlined in the composition of the JLF and its sub-committees,

since management and the unions have equal representation on each. Similarly, ferries, tunnels and the PTE have equal representation.

The JLF and the ULR meetings that have been established by the unions to support this have served to improve communication within Travelnet and to build trust between management and the unions, and between the different unions themselves. Indeed, the establishment of these institutions has arguably been a more significant development with respect to employee relations than the conclusion of the learning agreement itself:

“I don’t think anyone has seen the learning agreement for years actually. I very much doubt whether the ULRs would know what’s in it. Learning agreements are important, but they’re not that important. You can have a beautiful learning agreement signed by the Pope and the Queen but unless you have the structures in place it’s not worth a thing. It’s just a beautiful piece of paper.”
(Travelnet union official)

Although the Travelnet learning agreement is not substantive, it has formed the backdrop to the subsequent conclusion of a series of ad hoc substantive agreements relating to training and development. Such agreements have been primarily concerned with time off for learning. It has thus been agreed that any employee undertaking any course deemed necessary as part of the Performance Review and Development (PRD) process would be entitled to full time off or full time in lieu, as would any employee participating in a Skills for Life course. Similarly, any employee working towards the European Computer Driving Licence (ECDL), but not using IT within their job role, would be entitled to half time off, or half time in lieu. Another ad hoc substantive agreement provides for any employee undertaking any course to apply for an interest-free loan of £1,000 to purchase a computer, with this scheme being financed by Travelnet. Although management regards such agreements as ‘stand-alone’ arrangements that are not linked to the learning agreement itself, and though each agreement

was concluded as a result of informal negotiations, all have been subsequently ratified by the JLF. This is significant for two reasons: first, it indicates that these ad hoc arrangements now have formal status; second, and perhaps more importantly, it underlines the significance of the machinery established by the learning agreement, since this is enabling the partnership-based approach to learning to be firmly embedded within the organisation.

Learning and the broader industrial relations environment: trade union–management relations

Relations between management and the trade unions have improved significantly within Travelnet as a result of the adoption of a partnership-based approach to learning. To a large extent this is because the processes that led to the adoption of this approach resulted in increased communication, which has been sustained in equal measure both by the institutions established by the learning agreement, and by on-going informal contact between key management and union representatives. Improved communication in relation to the learning agenda has also improved communication within the organisation more generally, in some instances enabling potentially conflictual situations to be diffused at an early stage. This can be illustrated by a recent incident in which free tickets for the opening day of a Travelnet interactive attraction were distributed to PTE and ferry employees, but not to those working in tunnels. Here a simple phone call from a union official working in tunnels to the personnel manager resulted in a ticket allocation being made to tunnels employees, and the reduction of bad feeling among employees who have long considered tunnels to be the “forgotten service” of Travelnet:

“It’s one of those silly little things that two or three years ago might have resulted in a grievance and everyone being worked up. The culture was that there would have been resentment, and it would have been formally raised, and all it took was a phone call from X to Y and it was sorted out.”
(Travelnet union official)

The positioning of learning within a framework of mutual gains by both management and the unions has also enabled trust relationships to be built between key management and trade union representatives. This has influenced the broader industrial relations environment within Travelnet, making discussions over more conflictual issues less problematic:

“It’s like anything in life, if you build up a relationship on a feelgood issue then it’s easier when you have to deal with other issues where there isn’t such a feelgood factor.”
(Travelnet management representative)

According to another management representative, these developments have had a positive impact on management perceptions of the unions within Travelnet. The unions are now recognised as having expertise in relation to the learning agenda, and their commitment to the mutual gains agenda has to some extent convinced management that the unions have adopted a more accommodative approach to broader industrial relations issues. As a result, trade union influence has increased within the organisation:

“I think it’s made the trade unions be taken far more seriously by management. It’s given them a greater voice and at a much earlier stage.”
(Travelnet management representative)

Increasing trade union influence has been manifest in union representation on the Communication and Culture Group, and the Dignity at Work Group, which has provided an opportunity for the unions to have some influence in relation to the development of corporate strategy. Similarly, the agreement that a key trade union representative would be trained by Travelnet to act as an liP adviser has facilitated trade union involvement in the preparations for liP assessment, and therefore in the development of human resource development strategy within Travelnet also. The extent to which trade union influence in relation to human resource development policies are reflected in human resource development practices within Travelnet is, however, a moot point.

Evidence suggests that the attitudes and behaviours of many line managers have yet to change significantly despite developments at strategic level, and that employee access to training and development opportunities remains unequal as a result:

“Line managers are very variable in their approach to learning. Some are really up for it, but others see it as a threat. They see anyone who wants to do learning as a threat. They think they’re after their jobs... The culture here is top down. There is more support for learning among the top managers.”
(Travelnet ULR)

While increasing trade union influence has not been manifest in a broadening of the bargaining agenda, which is, according to one management representative, “already firmly established”, it has enabled the unions to make more effective representations on behalf of their members in relation to non-learning issues. This was exemplified most recently in an agreement that Travelnet would provide water coolers for employees working in the tunnels service. Water coolers have been available to staff in the PTE and ferries for some time, and this caused resentment among tunnels staff. Though arguably just a small win for the trade unions, the provision of water coolers has nevertheless improved the working conditions for tunnels staff and has also underlined the principle first established by the unions in relation to learning – that there should be a consistent approach towards the three services that comprise Travelnet.

A broadening of the bargaining agenda may be possible in the future, however. The successful operation of the JLF has resulted in an agreement to establish a Joint Negotiating Forum (JNF) operating on the same basis, but with a remit to consider broader industrial relations issues. Indeed a management representative indicated that the formation of the JNF had been possible only “because of the mutual trust generated by learning”. Where previously management had separate negotiations with the unions representing employees within each Travelnet service area, the JNF will establish the principle of

single-table bargaining. This development has been welcomed by the trade unions, because it is likely further to constrain the capacity that management has had to play off one union against the other. Significantly, it was recognised that this approach would bring business benefits to Travelnet also, because it would reduce by two-thirds the time expended on industrial relations issues:

“It’s an advantage from the trade union perspective because we all see things at the same time. It should speed things up too because there will be only one set of negotiations instead of three.”
(Travelnet trade union official)

Inter- and intra-union relations

Although all five trade unions operating within Travelnet are signatories to the learning agreement, there was nevertheless some initial opposition to the concept of partnership working in relation to the learning agenda among a minority of shop floor trade union representatives:

“Some of the shop stewards in some of the trade unions would have had concerns because it’s a new way of working, and also because [the Learning and Development Manager] deals with mainstream HR issues too.”
(Travelnet management representative)

To some extent such concerns reflect on-going debates within the trade union movement and beyond about whether partnership-based approaches to industrial relations issues represent an appropriate route to union renewal. They also reflect discussions relating to whether learning was best regarded as a production or a distribution issue, and thus whether it was more appropriately divorced from, or integrated within, broader industrial relations agendas. More significantly, the attitudes of some trade unionists, particularly those operating within the ferry service, also reflected a suspicion that management might utilise the learning agenda to facilitate a restructuring programme, as this had been the case in the recent past:

“Travelnet was thinking of getting rid of the ferries about ten years ago. They brought in a company, xxx, who looked at using learning as a way of restructuring. Learning was therefore seen as a threat. Ferry staff still bring up xxx to this day.”
(Travelnet management representative)

Such concerns were also apparent among sections of the Travelnet workforce. Staff employed within ferries and tunnels in particular regarded the learning opportunities provided by the Travelearn project as a management initiative, and were initially reluctant to participate in the learning activities available. Such fears appear to have been allayed with the passage of time, however, and within the unions the limited opposition to the establishment of a partnership-based approach to learning has largely dissipated.

Communication between the Travelnet unions has improved significantly with the increasing salience of the learning agenda, and the development of a partnership-based approach to learning:

“Before we began this process I’d never even met the convenor of the tunnels. They were in the City branch.”
(Travelnet union official)

Improved communication between the unions is regarded as a positive outcome of the development of a partnership-based approach to learning. Increased inter-union communication has led to the development of a more co-ordinated approach to the learning agenda, and has to some extent reduced management’s ability to play off one union against the other. It is, however, important to note that improved inter-union communication has arisen not from the conclusion of the learning agreement itself, but as a result of the process of developing the agreement, and that this has been sustained by the institutions that were established by the agreement.

Learning as a distribution issue?

Because learning is regarded as a production issue with the potential to generate mutual gains,

management and the unions agreed to ‘firewall’ issues relating to learning from the traditional bargaining agenda. For this reason, the learning agreement is a single-purpose agreement that was designed to operate alongside existing bargaining machinery. While the ULRs generally have responsibility for approaching management in relation to learning issues, some concerns relating to learning continue to be subject to the provisions of existing bargaining arrangements. If an employee were consistently denied access to learning that had been agreed as part of the PRD process, for example, the grievance procedure would be invoked, and the issue would therefore fall within the remit of shop stewards and branch officials rather than the ULRs.

These arrangements are regarded as both appropriate and advantageous by the unions, who suggest that the role of ULR is very different to that of the shop steward or branch official. Although many ULRs, especially within ferries and tunnels, are also shop stewards, a significant number, particularly within the PTE, are new to trade union activism, and were attracted to the post because they saw learning as a non-adversarial issue. It was suggested that, because such ULRs may have neither the skills nor the inclination to engage with the non-consensual aspects of the learning agenda, these matters would be more effectively handled by trade unionists with a more traditional role:

“The ULRs are not stewards. We need different people. You need different people for different things. Stewards have to be confrontational. You need people for that. A lot of the ULRs wouldn’t be happy in that role and wouldn’t have the skills.”
(Travelnet union official)

Concerns were expressed by some of the Travelnet management team that the conclusion of a learning agreement might lead to future demands from the trade unions for skills acquisition to be linked with rewards systems. In the event this has not been the case. The PRD process provides a mechanism for monitoring the impact of learning on employee

performance, but the trade unions are opposed to this being linked to any form of performance-related pay. The union position in part reflects perennial concerns about the equity of performance-related pay schemes, but is also born of concerns that the PRD process should remain developmentally focused and should not evolve into a purely evaluative exercise. The unions, in common with their management counterparts, also regard the opportunity to learn new skills to be part of the reward system. Similarly, and again in common with management, the unions consider skills acquisition to be indirectly rewarded through promotion opportunities within Travelnet.

The issue of learning is nevertheless beginning to filter into informal distributive bargaining. There has been a preliminary agreement to change the recruitment process in order to align this with the evolving approach to human resource development, and to ensure that this reflects the principles of equal opportunities. Internal applicants, who previously often lost out to external applicants, are therefore to be offered pre-application courses, which will be run jointly by the ULRs and the human resources department.

Given the argument that learning may be utilised by the trade unions to influence the broader industrial relations environment, it is particularly interesting to note that the reverse process has sometimes been the case within Travelnet. Most recently some employees withdrew their support for learning activities when a minor dispute occurred over an unrelated non-learning issue:

“They had some dispute in ferries or tunnels over tea breaks or something and people refused to come in and do their courses. They said it was because they were in dispute but the two had absolutely nothing to do with each other.”
(Travelearn project worker)

In such situations, the unions would not advise employees to withdraw from courses because this would be “cutting off your nose to spite your face”.

The unofficial actions of employees in this instance, then, could suggest either that they do not fully understand the concept of learning as a production rather than a distribution issue and the positioning of this within a framework of mutual gains, or alternatively that they are in favour of utilising learning to advance broader concerns that may be distributive in character.

The learning culture and performance outcomes: business benefits?

The adoption of a partnership-based approach to learning within Travelnet was, to a large extent, driven by the objective of effecting cultural change and transforming Travelnet into a learning organisation. Though debates rage about the extent to which the learning organisation exists beyond textbooks and rhetoric, both management and the unions perceive that a culture of learning is beginning to be established within the organisation. Around one-third of employees have accessed the Travelearn facilities thus far, with many beginning to appreciate that learning can facilitate career advancement:

“Some of the staff are beginning to realise that they can utilise Travelearn to get on.”
(Travelnet union official)

The improvements in communication, and the creation of a trust environment that has stemmed from the adoption of a partnership-based approach to learning, have also acted as a catalyst for change within the broader organisational culture of Travelnet:

“People’s attitudes have noticeably improved. The blame culture and the Chinese whispers have stopped because communication has improved.”
(Travelnet ULR)

This viewpoint was echoed by a management representative, who suggested that improved communications had resulted in employees coming to believe that their opinions were valued, and their aspirations taken into consideration by management:

“I think there has been a big change because people think they are listened to. We might not be able to give them what they want all the time, but at least now they can ask.”

(Travelnet management representative)

Objectively measuring the impact of learning upon performance is an area fraught with difficulties, and a senior manager indicated that Travelnet, in common with many other organisations, has yet to develop systematic methods for assessing this:

“We’re not very good at performance management really. That’s the next step, to link learning with performance.”

(Travelnet management representative)

There is nevertheless a general perception among both management and trade union representatives that employee performance has improved in the wake of the adoption of a partnership-based approach to learning. One manager suggested that this was manifest in Travelnet staff having being commended by external bodies for high standards of customer service:

“Our staff have won awards. Our call centre is acknowledged as being one of the best in the country.”

(Travelnet management representative)

Another indicated that the availability of learning opportunities had generated improvements in employee attitudes. It was suggested that many members of staff appear to regard Travelnet as a better employer than had previously been the case. This may provide significant business benefits to Travelnet in the shape of reduced labour turnover and more effective recruitment:

“We were always accused – probably fairly – that the manual and general workers didn’t have access to training. The project has meant that people know that they have access now... Staff think we are a good employer. This may help us to recruit and retain the staff we need.”

(Travelnet management representative)

Significantly, the views of managers in relation to employee attitudes were echoed by union representatives and ULRs, who each suggested that staff morale and motivation had improved.

One of the more tangible business benefits that has been generated by the partnership-based approach to learning has been the increased willingness of employees to apply for jobs in other parts of the organisation. This situation has to some extent arisen because of improved communication within Travelnet, as staff now have a greater level of awareness of developmental opportunities in other parts of the organisation. These developments are, however, perhaps also indicative of increasingly adaptive behaviour within the Travelnet workforce. In either event, such developments suggest that Travelnet will be better able to utilise the human resources available within the organisation.

Summary

Within Travelnet, the processes that led to the conclusion of a learning agreement have arguably had a more significant influence on the subsequent development of industrial relations within the organisation than the learning agreement itself. Rather than giving rise to a partnership-based approach to industrial relations issues, the learning agreement was in fact made possible by the commitment of key management and trade union actors to a partnership-based approach to learning, and the positioning of the learning agenda within the mutual gains model. These developments facilitated the conclusion of the learning agreement because, first, they improved communications between management and the unions within the organisation and, second, they enabled the establishment of a trust-based relationship. The JLF, instituted by the agreement, and the ULR meetings that were established to support this have nevertheless contributed to the sustainability of the partnership-based approach to learning, and in the case of the JLF have copper fastened a number of the informal agreements relating to learning concluded since the agreement was signed.

The partnership-based approach to learning adopted within Travelnet has had a number of positive outcomes for the trade unions. It has facilitated the development of a more co-ordinated approach to training and development issues, and has increased their credibility and influence within the organisation at strategic level. It has also enabled them to negotiate a number of substantive agreements representing small wins for their members. It is possible that further advances may be made because learning is beginning to feature, albeit to a limited extent, as a distribution issue.

Travelnet has also benefited from the partnership-based approach to learning. The organisation now has a more strategic approach to human resource development, and a learning culture is beginning to be established. Further research will be needed to establish whether this has been translated into improved employee and organisational performance, though initial evidence appears promising.

Case study six: TurbCo (Eastown site)

The context

TurbCo is one of the world's largest conglomerate companies, whose core interests lie in the ICT, automation and control, energy, transport, medical and electrical engineering sectors. The company and its subsidiaries operate in 190 countries, with a global workforce of 461,000; approximately 21,000 are employed in TurbCo's UK operations.

TurbCo operations at the Eastown site employ 2,200 staff, with the company being the largest private sector employer in the town. The production plant, which employs the bulk of the workforce, manufactures industrial gas turbines for a range of customers in the oil and gas production industries, though the Eastown site also houses a service department providing an after-purchase maintenance facility, and oil and gas commercial operations. The three areas of business are regarded as separate profit centres within the company. The production plant is a world leader in gas turbine manufacture, with a 20 per cent global market share, but nevertheless faces a number of significant challenges if it is to increase its market share to 25 per cent and achieve break even, in line with corporate expectations. Chief among these is the need for skilled labour. Although much of the workforce is highly skilled, the recruitment of additional skilled operatives has proved problematic because the plant is located in a predominantly rural county without the engineering tradition associated with many major conurbations:

“In large cities you can poach, to be frank. Rolls Royce for instance could recruit for us, and we could recruit for them.”
(TurbCo management representative)

The company has attempted to overcome these difficulties by forging links with local schools and institutes of further and higher education, but the existing workforce is ageing,²⁵ and apprenticeship recruitment does not currently cover exits. Yet skills

gaps are also evident within the existing workforce. These have been predominantly manifest in high scrap rates – a major concern given the use of costly component parts made from specialist metals that are difficult to source – and it is acknowledged that reductions in wastage would make the single most significant contribution to the operating efficiency of the plant.

Despite the availability of public funding through the ULF for union-led workplace learning initiatives, Union C²⁶ officials at the Eastown plant were initially reluctant to engage with the learning agenda, ostensibly because employees at the plant were able to access a wide range of employer-sponsored training and development opportunities:

“The branch had previously been invited to TUC learning conferences, but we never attended. I was a bit sceptical about it, learning, to be honest, because the company is a first class provider.”
(TurbCo trade union representative)

Yet this approach also reflected the priority placed upon traditional bargaining issues by union officials, and, perhaps to an even greater extent, existing patterns of industrial relations at the plant. Historically, relationships between management and the unions at Eastown have been stable. Formal consultation and bargaining machinery has been buttressed by extensive informal consultation processes and high-trust relationships have developed between key individuals. Union officials therefore perceived that engagement with the consensual aspects of the learning agenda was not necessary in order to found a partnership-based approach to industrial relations at the plant, since this form of accommodation had, to a large degree, already been reached. The learning agenda within the Eastown plant was therefore initially driven forward by Union C regional officials rather than local representatives, though plant-based ULRs have since assumed a more significant role.

²⁵ According to management representatives, the average age of production workers is around 50.

²⁶ Union C represents some 98 per cent of the organised workforce at Eastown.

The existing pattern of industrial relations was evident when Union C applied in 2003 for ULF funding to equip a union learning centre within the production plant, since management representatives at the plant were supportive of this undertaking – not least because of recognition that trade unions had a role to play in engaging non-traditional learners in learning activities. Management representatives therefore agreed to provide the premises and consumables for the learning centre and, according to ULRs, have continued to provide financial support over and above the initial match-funding contribution. The provision of basic skills courses within the centre was also positioned within a framework for mutual gains, since it was acknowledged that developing such skills would not only increase the employability of learners within both internal and external labour markets, but would also make a significant contribution to the efficiency of the plant by reducing scrap rates:

“Improving basic skills can help with this because if people can measure properly they can work more accurately and reduce scraps.”
(TurbCo trade union representative)

The corporate objective of developing a learning culture within the Eastown plant and improving communications between the company and production workers by providing access to the company intranet has also been facilitated by the establishment of the learning centre. Indeed, the centre to some extent acted as a pilot for the institution of a further five on-site learning centres that were fully funded by TurbCo²⁷ :

“The concept [of on-site learning centres] was in the back of our minds, but it was the Union Learning Centre that enabled us to see how this worked. We saw the demand and realised that we could build on this. The business justification was that we could expand the learning culture.”
(TurbCo management representative)

The nature and scope of the learning agreement

The learning agreement signed by representatives of management,²⁸ Union C and Union F in August 2003 was developed by a group of ULRs, management representatives and Union C regional officials, though all parties acknowledge that the initiative was union-led. Because industrial relations at Eastown have historically been characterised by a very high degree of informality, local union representatives did not initially favour developing a formal learning agreement. They nevertheless elected to do so on the advice of the Union C regional officials involved in the process, who argued that a formal agreement would sustain union involvement in relation to the development of the learning agenda:

“We wouldn’t have the learning agreement now, I wouldn’t have thought, if they [Union C regional officials] hadn’t pushed it.”
(TurbCo trade union representative)

The learning agreement is in essence a framework document that commits management and the unions at the Eastown plant to work in partnership in order to promote a culture of learning within the workplace and widen participation in learning activities. The agreement is designed to be a stand-alone arrangement that is independent of existing bargaining machinery, and does not therefore provide for disputes in relation to learning to be subject to the existing grievance procedure. This reflects not only that the issue of learning has been divorced from broader industrial relations issues at Eastown, but also that the union-led learning initiative is regarded by both management and union representatives as a separate entity to corporate training provision because of its focus on the provision of non-vocational learning opportunities.

The learning agreement has a procedural element as it provides for the establishment of a joint union/

²⁷ The learning centres operated by the company are known as Knowledge Centres.

²⁸ The learning agreement was developed when the Eastown plant was the subject of a take-over bid by TurbCo.

employer Learning Partnership Committee (LPC). The LPC has a broad remit that includes identifying and prioritising the learning needs of employees; producing, implementing and monitoring learning plans for individual learners; and monitoring learning provision and contracts with outside training providers. The Committee meets on a monthly basis, and, like the ULR Committee that was established to support it, has provided a forum for the ULRs to develop their skills and confidence, and explore new avenues for funding. Indeed, a number of the ULRs have now developed the capacity to deliver courses themselves, enabling the Union Learning Centre to be less reliant on the services of the private sector training providers that were initially responsible for course delivery. The establishment of the LPC and the ULR Committee has then, arguably played a significant role in sustaining the union learning initiative at the plant as the learning agreement itself.

While the agreement has substantive clauses that entitle the ULRs to take reasonable paid time off and to have access to facilities that will enable them to undertake their duties, there are no substantive points relating to learner entitlements. This reflects the historic emphasis that has been placed upon informal relations between management and the unions at the Eastown plant and, in keeping with this approach, the agreement charges ULRs with agreeing arrangements for employees to access learning opportunities with the Organisational Development Department. In practice the ULRs negotiate release for employees to attend courses in the learning centre directly with the first line supervisor of the employees concerned. This informal approach is perceived to provide greater flexibility for the ULRs, not least because it enables them to emphasise the business benefits of learning to managers who might otherwise be reluctant to allow employees time off for learning:

“If you tie them [management] down too much you shoot yourself in the foot. We have trouble with some managers of course, but we just say: ‘What’s your scrap rate, mate?’”
(TurbCo ULR)

Learning and the broader industrial relations environment: trade union–management relations

Prior to TurbCo’s acquisition of the Eastown business in 2003, the plant had been owned by a variety of companies, all of which had been either wholly or partly owned subsidiaries of Turbgroup. Under Turbgroup ownership, management at the plant had considerable autonomy in relation to industrial relations strategies, and this was reflected in the development of an accommodation with the unions based upon the principles of partnership, though this was neither formalised nor described in such terms at the time:

“We had a good record of working in partnership, without ever having a partnership agreement.”
(TurbCo management representative)

The partnership-based approach that developed at the plant was nevertheless evident in attempts to address issues relating to skill formation and utilisation. This resulted in the joint development in 1991 of the Agreement on New Working Practices (often referred to as the Flexibility Agreement), which made provision for the reorganisation of work and the regrading of employees in line with this, but also anticipated the changing skills needs of the business. It thus provided for employees to be retrained if their skills became redundant; for existing employees to join apprenticeship schemes if the normal channels of apprentice recruitment failed to deliver appropriate numbers; and for employees engaged in craft trades to train to a level beyond national minimum requirements and gain a qualification where appropriate. The agreement also linked skills acquisition with the remuneration system, and widened access to craft training and craft grades. A joint management–union Flexibility Committee was also established to ensure that these arrangements were regularly reviewed and updated to reflect business needs. Subsequent amendments to the agreement in 1996 established an appraisal system and linked the grading and remuneration scheme to the NVQ framework, with

this development in particular being regarded within the framework of mutual gains:

“The Flexibility Agreement was a win-win situation in terms of giving the company skills and the employees qualifications.”

(TurbCo management representative)

The informality and high-trust relationships that characterised the partnership-based approach to industrial relations under Turbgroup ownership were also evident in relation to issues relating to skills formation. This can be illustrated by the trade unions having an input into induction training, and the approach taken in relation to the apprenticeship programme. Here union representatives were customarily invited to attend meetings between management, external training providers and individual apprentices to discuss progress. Similarly, if issues were raised about the conduct of individual apprentices by an external training provider, management representatives would contact the unions so that they could provide representation for the apprentice concerned. As a result of this approach, most disciplinary issues were resolved informally without the need to invoke formal procedures.

Cooperation between management and union representatives in relation to the union learning initiative supported by the ULF project, then, represented an extension of the existing partnership arrangements at the plant, and was not regarded as a mechanism to change the basis of the relationship between the parties:

“It was just a natural progression. It wouldn’t have increased or decreased the trust. There was no conscious decision to improve relations with the trade unions by way of the learning agenda.”

(TurbCo management representative)

Industrial relations at the plant have begun to change in the last three years as a consequence of the change in ownership, and the resultant changes in management industrial relations strategies that reflect the corporate

rather than the local approach. Indeed, one senior manager at the plant described the impact on industrial relations of the TurbCo takeover as “the most significant development in the last ten or fifteen years”.

TurbCo is a process-oriented company and as such has standard policies and procedures that are applied across all its operations irrespective of their sector base or geographical location. The corollary of this is that managers at the plant have significantly less autonomy than was the case under the Turbgroup regime, and the informal relationships between management and union representatives have come under increasing pressure as a consequence. Such developments have been exacerbated by changes in management personnel, since a number of long-serving managers left the company following the takeover in response to reductions in their autonomy:

“Some of the informal agreements are being questioned by managers who were not here at the time and didn’t see the handshakes.”

(TurbCo ULR)

The high-trust relationship between management and trade unions at the plant has also come under pressure as a result of the change in ownership. To some extent this has been an unfortunate consequence of changes to the company pension scheme unilaterally imposed by TurbCo corporate-level management. This disadvantaged Eastown employees and managers alike, but nonetheless influenced how each of the parties was perceived by the other:

“This left a legacy that has coloured relations ever since. It didn’t help the issue of trust with TurbCo... I hope the local managers weren’t blamed. I don’t think we were because everyone was affected. I lost my pension the same as [the works convenor] did.”

(TurbCo management representative)

The high-trust relationship between management and the unions has, however, also been undermined as a result of managers at the plant adopting a more robust approach in relation to the unions at the

behest of corporate-level management, which was in favour of a more adversarial form of engagement with organised labour than that adopted by Turbgroup:

“TurbCo seem to want to fight everything, irrespective of whether they win or lose, and I think they see the unions within this framework.”
(TurbCo trade union representative)

This can be illustrated by a recent disciplinary case, which according to union representatives would have been addressed by way of informal processes under the Turbgroup regime, but in the event led to an employment tribunal in which TurbCo was represented by a leading barrister:

“The issues would [previously] have been resolved through informal processes before it ever came to an ET, but it [the employment tribunal] took a week and the company hired a QC.”
(TurbCo trade union representative)

The less accommodative approach towards the unions has also been manifest in managers bypassing collective communications channels such as the Works Committee and Communications Committee,²⁹ withholding information from union representatives and introducing changes to policies and procedures established through custom and practice without consultation or agreement:

“We used to be told everything. Now that’s not the case. Certain things we took for granted we can’t do any more. This isn’t through consultation. It’s a case of: ‘This is how it is. You do as you’re told.’”
(TurbCo ULR)

This approach was exemplified most recently when the no-smoking policy applicable within buildings at the plant was extended to cover the whole site. This issue was not raised by management representatives

at the Communications Committee, and indeed only came to the attention of trade union representatives by way of the company intranet.

TurbCo’s emphasis on formality and process has also impacted upon the learning agenda, though here the outcome has been more positive. According to management representatives the appraisal process established under the terms of the 1996 amendments to the Agreement on New Working Practices was not embedded throughout the plant, and production workers were considerably less likely to be appraised than white-collar employees. Under TurbCo ownership, however, managers are obliged not just to conduct appraisals with all employees but also to “conduct them properly”. As a consequence, production workers now have the opportunity to discuss their training needs with their immediate supervisors and for these to be addressed through corporate training provision. Given the emphasis on formality, the learning agreement may contribute to sustaining the union learning initiative in the manner anticipated by Union C regional officials, especially since this has been positioned within a framework for mutual gains. However, it may be the case that broader changes in management industrial relations strategies are likely to have little impact upon the union-led learning initiative because this focuses on non-vocational learning, has been regarded as a separate entity to corporate training provision from its inception, and is therefore further from the frontier of control.

The loss of trust that has resulted from the developing management industrial relations strategy has nonetheless weakened the partnership-based approach to learning that was evident in relation to the ULF project, because trade union officials and ULRs are now less willing to share information about the learning agenda with their management counterparts. Indeed, recent developments have

²⁹ Under Turbgroup ownership there was a separate joint Works Committees for blue and white collar operations. The two were brought together under TurbCo’s ownership. The functions and purpose of the Works Committee and the Communications Committee have become blurred under the current ownership, with the Communications Committee emerging as the most significant forum.

also caused one senior trade union representative to reassess the utility of partnership as a strategy for engaging with management – not just in relation to learning but also with respect to broader industrial relations issues:

“There’s definitely been a pushing of boundaries. The danger with partnership working is that you get embroiled in things you wouldn’t have done. A few years ago it would have been ‘over my dead body’. The lack of consultation is our fault as well. Before, we would have talked to management about an issue before it became a problem. Now, we only talk once there is a problem. We should have tackled them [management] about this.”
(TurbCo trade union representative)

These concerns echo on-going debates within the trade union movement in relation to whether moderation or militancy represents the most effective approach to engaging with employers. Yet they also reflect the fluidity of partnership-based approaches to industrial relations, since changes in management industrial relations strategies at the Easttown plant have shifted the balance of power within existing arrangements, which now more closely resemble the employer-dominant model of partnership than the labour-parity arrangements that were in evidence under the Turbgroup regime.

In tandem with changes in industrial relations strategies, TurbCo has also increased capital investment at the Easttown plant and has introduced initiatives such as lean manufacturing and Six Sigma designed to increase efficiency and improve product quality. Yet such developments hinge to a large extent on increasing workforce skill to facilitate increased functional flexibility, and as such formalise processes that have been on-going on an incremental basis since the 1991 Agreement on New Working Practices was developed:

“The only thing the TurbCo acquisition has resulted in is more formality and more rigorous application of these concepts.”
(TurbCo management representatives)

Changes in work organisation under TurbCo ownership have not then had any significant influence on relationships between management and the unions. To some extent this is because such issues are addressed within the Flexibility Committee, and as yet no attempts have been made by management to bypass this, or to marginalise the influence of the unions within it.

Inter- and intra-union relations

Union A, Union C and Union F are all recognised at the Easttown plant, with Union C representing the vast majority of organised employees. It was the influence of regional officials (rather than being the majority union), however, that led to Union C taking the lead in developing union learning initiatives at the plant. Union representatives were nonetheless keen to emphasise that the learning initiative is ‘owned’ by all the unions, and indeed a Union F representative currently chairs the ULR Committee.

This collaborative approach has to a large extent been facilitated by the absence of inter-union rivalries at the plant. This is partly a result of close cooperation between the unions in relation to traditional bargaining agendas within established negotiating and consultation forums such as the Works Committee, Communications Committee and Flexibility Committee. It nevertheless reflects an acknowledgement on the part of union representatives that their activity in relation to workplace-based learning initiatives is to a large extent dependent upon the support of management, and that this is less likely to be forthcoming if the unions are divided. Such considerations have added potency given the more robust approach towards the unions that has been taken by management since the TurbCo takeover:

“I think one of the good things is that we all work together. There’s no falling out. If the unions can’t agree there’s no point even meeting with management because all they’ll do is pick us off one by one and make us look stupid.”
(TurbCo ULR)

Cooperation between the unions in relation to the learning agenda has also been facilitated by the high level of union density at the plant, since this has meant that learning has not been positioned within strategies for union renewal by any of the unions operating on site. Indeed, the ULRs at the plant were keen to emphasise that union activities in relation to the learning agenda were employee centric, with the objective of increasing participation in learning activities being reflected in the promotion of open access to the learning centre:

“The focus is on the learners. We don’t discriminate. We even encourage non-union members to come to the learning centre.”
(TurbCo ULR)

Learning as a distribution issue?

The relationship between skill formation and remuneration has been a concern of the unions operating at the Eastown plant for many years. Historically this issue has been addressed within the established bargaining framework, with this giving rise to the 1991 Agreement on New Working Practices, and the 1996 amendments to this agreement. This approach has not changed as a result either of TurbCo’s acquisition of the Eastown plant, or the recent union-led learning initiative. The joint management–union Flexibility Committee established to review the 1991 Agreement continues to meet on a regular basis, and indeed made further amendments to the agreement in 2005 that reflected concerns about the relationship between pay grades and the NVQ framework. In this instance a new half-grade was introduced with a commensurate half-grade increase in pay to reward the acquisition of specific skills for which there was then no NVQ provision. In linking skill formation, the NVQ framework and remuneration, the Flexibility Agreement thus provides an incentive for employees to develop skills that they can utilise in order to undertake a broader range of tasks within the workplace:

“If a borer wanted to learn a centre lathe he would gain a payment once skilled.”
(TurbCo trade union representative)

In widening access to craft trades and craft training for existing employees, the 1991 Agreement addressed distribution issues relating to training to some degree. The formal appraisal system introduced in 1996 took this a step further in theory, though it is only during the last three years that the training needs of all employees have been subject to regular assessment. The learning agreement also addresses distribution issues relating to training, since this provides for all employees to be able to develop their skills in line with business and personal needs, and it would appear that the learning centre is making a significant contribution to the achievement of this objective. The unions have not sought to negotiate formal substantive agreements that provide paid time off for all employees to undertake learning activities, however, as they continue to promote an informal approach to such matters.

The learning culture and performance outcomes: business benefits?

The presence of ULRs and the Union Learning Centre has contributed to the evolution of a learning culture at the Eastown plant, as it has increased participation in learning activities and opened up learning to a broader section of the workforce. Such developments have, to some extent, stemmed from the focus on non-vocational learning, since this is not accommodated within either TurbCo training programmes or the appraisal process:

“You wouldn’t be able to raise non-job-related learning at your appraisal, but you could to a ULR.”
(TurbCo management representative)

Yet ULRs at the plant also attribute the high use of the learning centre to its learner-centred focus, and its location in a relatively isolated part of the plant, away from the gaze of management:

“TurbCo facilities are fantastic. State of the art. Our place is a bit of a tip, but people go in there because they feel comfortable. There’s no-one looking over their shoulder. Well, no-one can see through the windows to be honest.”
(TurbCo ULR)

These considerations are perhaps of particular pertinence given the loss of trust that has stemmed from changes in management industrial relations strategies, and indeed trust issues may lay behind the vandalism that management representatives concede has affected the Knowledge Centres but not the Union Learning Centre. Nevertheless, approximately 400 employees, representing around one-fifth of the total workforce at Eastown, have undertaken learning activities within the Union Learning Centre, with an initial waiting list for courses translating over time into a steady stream of learners. There are 123 employees currently undertaking ECDL courses, while 40 are participating in basic skills training.

Such developments represent a significant upskilling of the Eastown workforce, and management representatives have acknowledged that the performance of the plant has improved since the opening of the Union Learning Centre, though not to the degree that corporate expectations have been met:

“They [TurbCo] invest a hell of a lot of money but they expect a hell of a big return, and we’ve never met those expectations. The message we keep getting year on year is that we are not meeting our performance targets.”
(TurbCo management representative)

Management is, moreover, unwilling to attribute the performance improvements that have been recorded wholly to the union-led learning initiative, since a number of other initiatives affecting the organisation of work and the technological base of the plant have been introduced over the same time:

“They [management] won’t say it’s [improved performance of the Eastown plant] due to learning. They’ll say it’s due to lean production or new machinery or whatever.”
(TurbCo ULR)

Although quantifying the hard performance outcomes generated by the union learning initiative is methodologically difficult, TurbCo has nevertheless benefited from the ‘softer’ outcomes of the ULF project, as these have generated favourable publicity for the company, and a more positive corporate image within the locality. Support for the union learning initiative has also enable the company to demonstrate that it has embraced a partnership-based approach to industrial relations at the Eastown plant, despite having adopted a less accommodative approach towards the trade unions, which has tilted the balance of advantage towards management:

“The company likes to be seen as having a good relationship with the unions. They like the brownie points. They like the dissemination events. They like being highlighted as an example of good practice.”
(TurbCo trade union representative)

Summary

A partnership-based approach to the learning agenda has long been established at the Eastown plant, resulting in a number of formal agreements that positioned skill formation within a framework of mutual gains. The learning agreement developed by representatives of management and the trade unions in 2003 therefore represented an extension of the established approach to industrial relations rather than a break with the past. This approach has subsequently come under pressure because the TurbCo takeover of the plant precipitated changes in management industrial relations strategies that have changed the character of the partnership arrangements at the plant. Indeed, these have come to more closely resemble the employer-dominant model than the labour-parity arrangements that were a feature of the Turbgroup regime. Union influence

in relation to skills formation remains intact despite these developments, however, as the new managerial approach has been more in evidence in relation to the Communications Committee than the Flexibility Committee that addresses such issues.

The formal learning agreement may help to sustain the union learning initiative, given the increasing emphasis placed upon formal procedures by TurbCo; yet this initiative has not, in itself, impacted upon broader industrial relations agendas. This is largely a consequence of the initiative being divorced from broader bargaining issues, and regarded from the start as a separate entity to corporate training provision because of its focus on the provision of non-vocational learning opportunities. The union learning initiative has nevertheless been positioned within a framework for mutual gains, and there is some evidence that both the company and the unions have benefited from the outcomes of increased participation in learning among the Eastown workforce. The main benefits to the company have been achieved through the development of a learning culture at the plant, and by way of positive publicity and the projection of a more favourable corporate image within the local community: for the unions the benefits have been in the form of increased employability of their members.

The performance of the Eastown plant has improved since the establishment of the Union Learning Centre but, as TurbCo has increased capital investment and has introduced a number of initiatives that have impacted upon the organisation of work, it is unclear to what extent the performance improvements can be attributed to the increased skills of the Eastown workforce.

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