

# **ESTIMATING THE DEMAND FOR UNION-LED LEARNING IN SCOTLAND**

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

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The views in this paper are written in a personal capacity and are not attributable to any organisation by which the authors are employed or of which they are members.

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## **Abstract**

Based on data collected from workers, union learning representatives (ULRs) and union officers, this report provides the first comprehensive and formal statistical analysis of demand for union-led learning in the UK. The findings provide robust indicators of both current and latent demand for union-led learning in Scotland. We estimate that around 400,000 workers across all occupational categories intend to undertake a wide range of learning activities in the short to medium term. Trade union learning provision significantly increases the likelihood of expressing an intention to learn. Respondents indicated that they were more likely to undertake learning where advice and encouragement were available at the workplace, and where learning was organised in the workplace and through a trade union. In addition, increased union learning activity is likely to stimulate further demand for learning, with particular implications for ULRs.

## **Executive summary**

Since 2000, the Scottish Union Learning Fund (SULF) has provided significant public funding for unions to generate workplace learning programmes and projects. Through SULF, the Scottish Executive provides funds to unions to encourage workplace learning, and thus contribute to the Executive's lifelong learning strategy and the development of a smart, successful Scotland. The most recent evaluation of SULF to date (Findlay et al, 2006) identified benefits to workers, unions, employers and government arising from union-led learning.

In 2004-5, STUC commissioned a feasibility study to “explore the potential for a new organisation that would provide learning opportunities for working people through their trade unions”<sup>1</sup>. The stakeholder consultation undertaken as part of the feasibility study concluded that there was potential for a union academy to contribute to improving the take-up of lifelong learning and skills development opportunities, but that “the overall demand for union supported learning across all unions and members is not known”.

In 2006, STUC commissioned the first systematic research on estimating demand for union-led learning. The research reported here provides robust indicators of demand for union-led learning in Scotland derived from a review of the existing literature, a telephone survey of 750 workers in establishments with a union presence, a postal survey of ULRs and a postal survey of union officers. The data was then used to estimate an econometric model of intention to undertake learning.

More than one third of those surveyed (35 per cent) said they intended to undertake learning at some time in the future. This equates to 400,000 of the relevant population (i.e. those working in establishments with a union presence). A further 21 per cent

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<sup>1</sup> York Consulting, 2005

answered possibly or maybe, with nearly 75 per cent of this group reporting plans to undertake learning in the next two to three years. Of those interested in learning, 43 per cent wished to do so in order to progress in their present job, 32 per cent wished to do so for their own career/personal development, and around 15 per cent for their own personal interest or enjoyment.

Respondents indicated interest in a wide range of learning areas including IT; health, medical or care related skills; further qualifications; management/customer services skills; craft skills; financial, accounting and legal skills; and hospitality skills.

A striking result of the survey is that when identifying factors that would increase the likelihood of undertaking learning, respondents rated the following factors highly: advice from someone at work (60.3 per cent); encouragement from someone at work (65.1 per cent); learning organised through a trade union (51.9 per cent) and learning organised at the workplace (67.7 per cent).

The other factors related to a desire to learn were having some qualifications already, working in the public sector and being under 50.

Of those who expressed an interest in learning, 50.2 per cent were currently earning less than £24,000 per annum, the national average at the time of the survey. People earning less than average income make up 63.9 per cent of those who said that they might undertake learning in the future.

An econometric model of intention to undertake learning was estimated from the survey data. One of the strongest (and most statistically significant) effects is that of being positively encouraged by trade union provision. Individuals who say they are more likely to take up learning if it is provided through their union are 2.48 times more likely to say they intend to learn than those who do not.

Another characteristic that makes an individual more likely to wish to take up a learning

opportunity is the provision of advice, encouragement and support within the workplace. This would appear to provide evidence for the view that the provision of union-led learning can, to a considerable degree, create its own demand. The model also suggests that workers in temporary employment are more likely than those in permanent employment to want to undertake learning.

Perhaps the most significant finding from the survey of ULRs is their perception that there is significant latent demand for learning in their workplaces. On the basis of a mean estimate of 61 learners per ULR and the number of ULRs in Scotland, there should be confidence that a target number of 50,000 over ten years (including learners involved in trade union learning) is achievable.

These new learners are, from the ULR responses, likely to be drawn from all occupational categories and be engaged in all types of learning. They will include both men and women workers, workers in the youngest and oldest age groups, ethnic minority and migrant workers. However, the ULR survey does highlight the fact that while it appears that temporary workers are more likely than others to want to learn, they are not currently taking up learning opportunities in significant numbers. Taken together with the survey data, this evidence suggests that there is a supply problem to this group of workers rather than a lack of demand, which explains their lack of participation in learning opportunities.

There are currently more than 2,200 people involved in union education in Scotland, although there are good reasons to believe that this figure is an underestimate - both in terms of actual education activity and demand for union education. A majority of union officers believe that this demand is likely to rise in the next few years for a variety of reasons relating to strategic union factors, both internal and external. Most believed that, with additional resources, they could deliver many more learners.

While union officers were largely positive in their assessment of the availability, quality and cost of available union education in Scotland, they also identified the potential to

expand union education and the role of closer collaboration of unions in both generating and responding to such an expansion.

The evidence contained here is the first comprehensive and formal statistical analysis of demand for union-led learning in Scotland or the UK. A high degree of consistency of outcome resulted from each of the data sources used. This provides reliable evidence that there is considerable current demand and latent demand for union-led learning in Scotland, and that increased union activity in this area is likely to further stimulate demand. Any expansion of union-led learning would, of course, place additional learning demands on ULRs and would highlight further the need for them to be appropriately supported by unions and employers.



## Background

Trade unions have a long history of involvement in learning activities, dating back to the late nineteenth century. The establishment of the TUC Training College in 1957 heralded a significant expansion of learning and training activities for trade union representatives, with such activities being further stimulated by legislative developments thereafter. This expansion has also been assisted by the provision of public funding for TUC-approved courses in the 1970s and 1980s, and from 2002 to the present.

While most unions have long provided learning opportunities for their officers, representatives and sometimes for their activists, some also have considerable experience in the provision of lifelong learning opportunities for their members (for example, UNISON's *Return to Learn* project and the Scottish Professional Footballers' Association *Education Trust*).

More recently, there has been considerable expansion in the numbers of unions who make learning services available to a wider group of members. These activities have been both a response to, and a driver of, public funding for union-led learning activities. The Union Learning Fund in England (ULF) and the Wales Union Learning Fund (WULF), both established in 1998, and the Scottish Union Learning Fund (SULF), established in 2000, provide significant public funding for unions to generate workplace learning programmes and projects. In their early stages, both funds have supported the recruitment, training and development of Union Learning Representatives (ULRs).

Through SULF, funds are provided by the Scottish Executive to unions to encourage workplace learning, in order to contribute to the Executive's lifelong learning strategy and to the development of a smart, successful Scotland<sup>2</sup>. The lifelong learning strategy seeks to offer everyone in Scotland the chance to learn irrespective of background and personal circumstances. Its purpose is to enhance personal fulfilment, employability, active citizenship and social inclusion. Skills, education and workforce development are

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<sup>2</sup> Scottish Executive, 2005

key aspects of this strategy. Learning can be both job-related and non-job-related: contributing to employability but also personal fulfilment.

The evaluations carried out to date of both ULF and SULF have been extremely positive<sup>3</sup>. A recent evaluation of all rounds of SULF to date (Findlay et al, 2006) identified benefits to workers, unions, employers and government arising from union-led learning. Workers have benefited through enhancing both their technical and personal skills and qualifications, with positive consequences for employability. While there remain concerns over the extent to which public funded learning initiatives have focused on a narrow employers' agenda in terms of skills and learning<sup>4</sup>, unions have benefited in terms of greater (and more positive) exposure, developing new internal capabilities and attracting new members and activists, all of which have implications for union renewal and revitalisation<sup>5</sup>. For employers, union-led workplace learning has delivered 'soft' performance benefits as well as improved employee relations. Union-led learning has also contributed to important Scottish Executive priorities in terms of employability and social inclusion.

There is wide recognition across the policy-making community and among individual employers of both the importance and the uniqueness of union activities in relation to learning. Unions can overcome barriers to workplace learning in ways not open to government, employers or other agencies and can therefore access 'hard to reach' learners. Further, the nature of trust relations prevailing between unions and their members and the influence unions bring to bear on management facilitate better learning outcomes<sup>6</sup>. This phenomenon is not solely a feature of publicly funded union-led learning – the positive impact of unions on learning and skills more generally is well documented<sup>7</sup>.

The availability of public funding for union-led workplace learning has driven a number

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<sup>3</sup> See Wood and Moore, 2005; and Wallis, Stewart and Greenwood, 2005.

<sup>4</sup> See Shelley, 2005; Forrester, 2004.

<sup>5</sup> See also Munro and Rainbird, 2004.

<sup>6</sup> Findlay, Warhurst, Stewart and Dutton, 2006

<sup>7</sup> TUC, 2005

of changes in the priorities, internal organisation and practices of individual unions and union federations. The TUC established unionlearn (formerly referred to as the Union Academy) in 2006 to encourage a “step change” in union involvement in workplace learning, to support unions in all learning activities and to become “the centre of excellence for supporting high quality union-led learning”<sup>8</sup>.

The STUC established its Lifelong Learning Unit in 1999, prior to the first round of SULF funding in 2000. The Unit expanded in 2005 to become the Skills & Lifelong Learning Team at the STUC. The team now includes in its tasks supporting individual unions’ applications for and monitoring of SULF projects.

In 2004-5, the STUC commissioned a feasibility study to “explore the potential for a new organisation that would provide learning opportunities for working people through their trade unions”<sup>9</sup>. This study, undertaken by York Consulting Ltd, considered the feasibility of establishing a Scottish Union Learning Academy.

The stakeholder consultation undertaken as part of the feasibility study concluded that there was potential for a union academy to contribute to improving the take-up of lifelong learning and skills development opportunities, but that “the overall demand for union supported learning across all unions and members is not known”. The feasibility study proceeded on the basis of a goal of 50,000 new learners over five years, representing a doubling of the current levels of activity (comprising 2,500 individuals per annum engaged in trade union learning, around 2000 involved in SULF related learning, and an unquantified number of other learning activities within unions).

Unionlearn’s targets for 2006-07 in England have been set at 100,000 learners. On the basis of relative populations this would suggest an annual target for Scotland of 10,000 learners, which is the same as the goal outlined above. Unionlearn also aims to help 250,000 workers into learning by 2010. Using the same pro rata assumption, a target of

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<sup>8</sup> [www.unionlearn.org.uk/about/index.cfm?mins=105](http://www.unionlearn.org.uk/about/index.cfm?mins=105)

<sup>9</sup> York Consulting, 2005

25,000 union learners in Scotland by this time can be arrived at.

The feasibility study concluded that there was a need to clarify and quantify the volume and nature of the demand for union-led learning in order to secure funding for an Academy. It acknowledged that some indicators of this demand might be aspirational.

The current research is a response to the need for more robust indicators of demand for union-led learning in Scotland. From the earliest stage of this research it became clear that there was little precedent in terms of such a study. No study of demand for union-led learning took place prior to the allocation of £4.5m by the DfES to establish unionlearn, and we could uncover no other research on existing demand for union-led learning elsewhere in Britain. (The TUC have commissioned the Open University to undertake a learning survey of employees, which is ongoing, and which will contain a limited number of indicators of demand)<sup>10</sup>.

While at one level this appears surprising, given the level of public funding invested in union-led learning, it is clear that trade unions have been able to establish a level of existing and potential demand on the basis of their ongoing learning activities. Supply has been determined by the availability of resources rather specified levels of demand, and in many areas, demand by unions for the funding of workplace projects has far exceeded supply<sup>11</sup>. It is widely accepted within the union movement that current learning activities represent a small proportion of existing demand for learning.

The remit of the recent SULF evaluation did not include a systematic measuring of unmet demand for workplace learning. However, the evaluation indicated that SULF projects had both revealed and stimulated “a so far unappreciated large demand for workplace learning” which was not being matched by SULF activities. Further, there was evidence that SULF was acting as a catalyst for learning culture change, which was likely to generate further demand as existing learners progressed up a *learning escalator*, and new

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<sup>10</sup> Personal communication, Bert Clough, TUC

<sup>11</sup> Personal communication, Elizabeth Killoran, Northern TUC.

learners were attracted into learning.

A number of practical difficulties were identified, however, which have implications for any estimates of demand for learning. ULRs were struggling to cope with demand and as a consequence their ability to find time to record engagement with potential learners in a systematic way was affected, as was their ability to follow up expressions of interest.

There are examples of research that attempt to measure demand for learning in a variety of contexts (e.g. Bergstrom et al, 1982; Rongen, 1995; Wheelhouse, 2005). Some of these measures of demand are derived from respondent preferences for public expenditure on education. Others rely on measuring applications for formal study at higher and further education institutions. Neither of these approaches is helpful in determining hitherto unexpressed demand for formal study, nor demand for a broader range of learning activities.

The dearth of research into the demand for union-led learning in Scotland and elsewhere has necessitated the development of a framework and approach to such a study outlined in the next chapter.

## **Methods of evaluation**

### **Research design**

The research undertaken here is both quantitative and qualitative. There are a number of potential sources of information on demand for union-led learning – members of the working public who are potential learners, ULRs who have a direct responsibility for workplace learning and union officers, who have a strategic responsibility for union-led learning and trade union education.

### **Data collection stages**

- Stage 1: Desk research involving a review of existing, relevant secondary material.
- Stage 2: Review of existing provision for union education in Scotland.
- Stage 3: Telephone survey of 750 people in employment in establishments with any union presence in Scotland.
- Stage 4: Postal survey of 200 ULRs across Scotland
- Stage 5: Postal survey of 39 STUC-affiliated trade unions and a postal survey to the Royal College of Nursing (not affiliated to the STUC). This survey was directed to a named union professional/officer with responsibility for union-led learning including union education in Scotland.

### **Stage 1**

The review of secondary materials focussed on three main areas. Firstly, we considered the academic literature on union-led learning. Secondly, we considered trade union and public policy materials relating to union-led learning. Lastly, the econometrics literature

as it pertains to demand for public goods, and learning in particular, was considered.

## **Stage 2**

The role, remit and activities of TUC Education in Scotland was assessed using publicly available materials and materials issued to us by the TUC Education Officer for Scotland.

## **Stage 3**

Accent Ltd was commissioned to undertake a telephone survey of 750 people. Two eligibility criteria were stipulated: that the potential respondents were employed, and that they were employed in an establishment with union members (although respondents did not have to be trade union members). A number of sampling targets were specified in terms of sex, age and employment group.

The questionnaire was delivered to Accent in electronic format and converted by them into a CATI (computer aided telephone interview) format. A small pilot of five telephone interviews was carried out in early October 2006 to check the clarity and flow of the questionnaire, the routing and the likelihood of achieving acceptable hit rates. The final questionnaire, containing 18 closed and two open questions, is contained in Annex 1. A cleaned and labelled SPSS dataset was delivered to the research team in mid November 2006.

Following the pilot a telephone survey of 750 people in employment in establishments with any union presence in Scotland was undertaken. In the survey (see Annex 1) respondents were asked a variety of questions about their intentions regarding learning. In addition, they were asked a number of questions regarding their employment status, their earnings and their family and personal circumstances.

The survey was designed to elicit information to help identify which characteristics make learning more likely and what, barriers if any, are the motivators to learning. There are estimated to be 1,150,000 people employed in organisations in which there is a union

presence<sup>12</sup>. The sample, therefore, represents 0.006 per cent of the total Scottish population, which is in line with many other published work using surveys of this type.<sup>13</sup>

#### **Stage 4**

A postal survey of ULRs across Scotland was undertaken. The contact letter and questionnaire are presented in Annexes 2 and 3 respectively. The letter, questionnaire and a pre-paid reply envelope were issued to 150 participants at a ULR conference in Dundee organised by the STUC in November 2006. An additional 50 potential respondents were identified from the STUC ULR database and materials were sent to them directly by the STUC. The response rate for the survey was 25 per cent.

#### **Stage 5**

A contact letter and postal survey was sent to union officers in Scotland with responsibility for union learning, including union education, in all unions affiliated to the STUC and also to union officers in the Royal College of Nursing. This survey was primarily aimed at assessing current and future demand for trade union education in Scotland. A list of STUC affiliates is included in Annex 4. The covering letter and postal questionnaire are included in Annexes 5 and 6 respectively. These materials were distributed directly by the STUC along with a pre-paid envelope. A follow-up email was sent to help boost the response rate. Forty questionnaires were sent out with a covering letter. The response rate for union officers/union professionals was 20 per cent.

There is no agreed minimum acceptable response rate for surveys. Recent business surveys have had response rates of 15-20 per cent<sup>14</sup> although it is important to receive a minimum 10 per cent response rate in order to comment on the significance of findings<sup>15</sup>. While both of the directly issued surveys more than meet this criterion, the response rate was somewhat lower than expected given the nature of the respondents and the issues under investigation. There are real constraints, however, on ULRs, in particular, in terms

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<sup>12</sup> York Consulting (2005)

<sup>13</sup> For example, Bergstrom, T.C., et al (1982) and Rongen, G (1995)

<sup>14</sup> Saunders *et al*, 2000.

<sup>15</sup> Saunders *et al*, 2000.



of the demands made on their time by union activities. This may well have affected the response rate.

### **Public demand for learning**

Here the results of the telephone survey of employees in unionised workplaces in Scotland are analysed using a variety of statistical and econometric methods. Firstly, a series of descriptive measures are examined and the key relationships and findings are highlighted. Secondly, a logit model is estimated that gives us information about the characteristics of employees that are likely to make them more or less likely to say they wish to undertake learning now or in the relatively near future.

In terms of the demand for any type of learning now or at some unspecified time in the future, the survey results indicate that almost 35 per cent of our sample says that they do intend to take part in learning. This would equate to just over 400,000 of the relevant population (i.e. those working in organisations where a trade union is present). In addition, just over 21 per cent of those surveyed gave the answer 'possibly/maybe' when questioned about intentions to take part in learning. However, when these people were questioned further about when they might consider taking up learning, nearly three quarters of them indicated that they were considering learning within the next two to three years at the latest. Only a quarter said they were considering learning in a period beyond four to five years. This would suggest that there is considerable variation in the strength of intention or focus of this 'undecided' group.

In terms of the reasons given for learning, there appeared to be a wide variety of factors. Forty-three per cent of those interested in learning indicated that their desire to learn is associated with a desire to progress in their present job. For 32 per cent of respondents, a desire for learning was related to their own career/personal development. Around 15 per cent wished to undertake learning for their own personal interest or enjoyment.

The additional areas of learning that respondents identified as of interest to them are listed in descending order of frequency below:

- IT/computing skills
- Further academic study/qualifications (including languages, maths, science and arts)
- Health, medical, care-related skills
- Management, customer services, human resources and training related skills
- Craft skills
- Health and Safety training
- Financial, accounting and legal skills
- Hospitality skills
- Physical activity/leisure related skills.

A striking result from the survey is that when asked about factors which would make respondents more likely to take up learning, the following factors were rated highly: advice from someone at work (60.3 per cent); encouragement from someone at work (65.1 per cent); learning organised through a trade union (51.9 per cent); learning organised at the workplace (67.7 per cent).

Of those who expressed an interest in learning, 50.2 per cent were earning less than £24,000 per annum, the national average at the time of the survey. People who earn less than the average income make up 63.9 per cent of those who said they may undertake learning in the future.

Expectation of future income was also related to the intention to undertake learning. A cross-tabulation analysis reveals that those who said they expected to earn more in the future were significantly more likely to say they intended to take part in learning. Of course, the direction of causation cannot be determined from a cross-tabulation, but one possibility is that those who have ambitions in terms of their career may also be more likely to undertake learning. Equally likely is that those who are learning, or who intend to undertake learning, expect to earn more in the future as a result. Either way, it indicates that a clear relationship is perceived to exist between learning and career, or

earnings, progression.

The relationship between intentions to learn and the highest level of existing qualification was also examined. The results of the cross-tabulations suggest that those with no, or Level 1 or 2 qualifications (S/NVQ Level 1 and 2), are less likely than expected to say that they intend to learn. Those with Level 3-5 qualifications are more likely than expected to undertake learning. This may suggest that people develop a 'taste' for learning, or it may suggest a lack of confidence in learning from those with little or no experience of obtaining formal qualifications. We will return to this relationship when we discuss the results of the econometric investigations later in the document.

Investigation of a possible relationship between private/public sector employment and the desire to learn reveals that employment in the public sector carries with it a greater than expected tendency towards learning. Again, there are a number of possible explanations for this. It may be that opportunities for learning, or rewards for learning, are greater or more formalised in the public sector.

Investigation of the relationship between age and intentions to learn reveals that the proportion of people who intend to learn rises for each successive age band up until the age of 50, and declines thereafter. Again, this is re-examined in the formal model.

No detailed investigation of the effects of race or ethnic origin on the intention to learn was possible given the nature of the sample, which contained only 4 non-white respondents.

No significant relationship was found between intention to learn and the presence of children or other dependents. This may be less surprising given that the entire sample are already in employment and therefore have childcare arrangements in place.

Given the nature of the problem under investigation, it was decided that the most appropriate way to examine the relationship between the declared intention to learn and

any identifiable characteristics of the sample respondents was by way of a logistic regression. Logistic models are part of the class of limited dependent variable models used in circumstances where the variable being explained is not continuous but is discrete in character<sup>16</sup>. In the present example, the declaration of an intention to learn is specified as ‘yes’ or ‘no’ i.e. it is binary in character. The logit model provides us with a way of determining the effect of various factors on the log of the odds in favour of a particular individual being a ‘yes’ or a ‘no’ i.e. we can determine which factors increase or decrease the probability of someone having an intention to learn. This is the only known formal statistical investigation of the demand for union-led learning in Scotland (or the UK) but the methods used are well known, have been used widely, and are appropriate for this purpose.

For the present purpose, it was decided to reclassify the ‘possible/maybe’ answers as ‘no’. As indicated in section 3.2, there may be good reason to believe that a substantial majority of those who replied ‘possible/maybe’ are actually firmer in their intention to learn than might initially be thought. However, it was decided to take a more cautious approach to the interpretation of the responses to this particular question so as to strengthen the validity of the results.

After examination of the basic statistical analysis of the data, the following variables were selected as the most important explanatory variables: age (in four banded categories); income (in four banded categories); highest existing qualification (in five levels); permanent employment; full time employment; a variable to indicate disability; having children/dependents; aspiring (i.e. expects to earn more in future); declaring a positive attitude towards union organisation of learning (TU). The last variable (TU) was chosen as it captures the variables referred to in Section 3.4 (advice and encouragement in the workplace and union provision/organisation of learning) through the network of ULRs.

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<sup>16</sup> J Scott Long , 1997

**Table 3.1: Set of Explanatory Variables**

<b>Variable</b>	<b>Default Category</b>
Female	Male
Age 1 (18-24)	Age 3 (35-49)
Age 2 (25-34)	Age 3
Age 4 (50+)	Age 3
Permanent	Temporary
Full time	Part time
TU	Not motivated by TU organisation of learning
Aspirations	Don't expect to earn more in future
Dependents	No children/dependents
Disabled	No disability
Topinc (£40,000 +)	Avginc ((£15,000-£23,999)
Highinc (£24,000 - £39,999)	Avginc
Lowinc (<£15,000)	Avginc
Level 1 S/NVQ	No Qualifications
Level 2 S/NVQ	No Qualifications
Level 3 S/NVQ	No Qualifications
Level 4 S/NVQ	No Qualifications
Level 5 S/NVQ	No Qualifications

The results of the estimation of the logit model are presented below. The final column indicates the extent to which this factor makes it more or less likely that an individual will say they intend to undertake learning.

**Table 3.2: Results of estimation of the logit model**

	B	Sig.	Exp(B)
Female	.049	.792	1.050
Age1	-.561	.283	.571
Age2	-.069	.741	.933
Age4	-.095	.669	.909
Permanent	-1.075	.011	.341
Fulltime	-.282	.245	.754
TU	.909	.000	2.482
aspirations	.400	.020	1.492
dependents	.061	.737	1.063
Disabled	.304	.381	1.355
topinc	.203	.352	1.226
highinc	.105	.517	1.111
lowinc	-.301	.126	.740
Level1	.335	.400	1.397
Level2	.607	.116	1.835
Level3	1.086	.002	2.961
Level4	.884	.015	2.422
Level5	1.703	.000	5.490
Constant	-.908	.117	.403

The estimated coefficients of logit models have a slightly different interpretation from regression analysis using continuous variables. However, as the probability of something increases then both the odds and log-odds also increase. From Table 3.2 above we can see that one of the strongest (and most statistically significant) effects is that of being positively encouraged by TU provision. Individuals who display this characteristic are 2.48 times more likely to say they intend to learn than those who do not.

Compared to the 35-49 age group, all age groups are less likely to say they intend to learn (although the results are not significant at the 10 per cent level of significance).

Another significant result is that being in permanent employment reduces the probability that an individual will declare an intention to learn by a factor of 0.341 (i.e. around a third less again) compared to those in temporary employment. There may be a push factor here in that the insecurity of temporary employment might give an incentive to learn in order to obtain permanent employment.

In terms of the declared expectation to earn more in the future, those who have this expectation are 1.49 times more likely to say they intend to take up a learning opportunity.

The results of the 'highest existing qualification' variables are broadly in line with those derived from the basic cross-tabulations (although only those in relation to the top three groups (S/NVQ Levels 3, 4 and 5) are statistically significant). Compared to those with no qualifications, those with Level 3 qualifications are 2.96 times more likely to want to learn. The corresponding figures for Level 4 and 5 are 2.42 and 5.49 respectively.

None of the variables that relate to the existence of dependents (children or adults), the presence of a disability or income are statistically significant. They are, however, all positive, with the exception of low-income groups (who are less likely to want to learn than those with average income).

To summarise, the survey results indicate a considerable degree of demand for learning among the relevant population group i.e. those who work in organisations with a trade union presence. A direct application of the sample to the population would suggest that, over the next four to five years we might expect numbers of around 400,000 potential union learners. It may be prudent to take a more cautious view of these results given the known problems of the survey method; however, it does seem likely that the numbers are certainly as high, if not considerably higher, than those indicated in the feasibility report produced in 2005<sup>17</sup>.

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<sup>17</sup> York Consulting *op cit*

This statement can be made in stronger terms given the results of the other investigations reported in chapter four of this report. Also, as noted earlier, we have completely excluded from this figure those people who answered ‘possibly/maybe’ to the question about whether or not they intended to take part in learning, even though many of them were thinking of doing so within a period of three years. The inclusion of at least some of this group would have increased the estimated number of potential learners in the population still further.

In addition, there are a number of characteristics that make an individual more likely to wish to take up a learning opportunity. Chief among these is a positive attitude towards the provision/organisation of learning by a trade union. More generally, there is a clear demand for advice, encouragement and support within the workplace. This would provide evidence for the view that the provision of union-led learning can, to a considerable degree, create its own demand.



## Existing and latent demand for learning in unionised workplaces

The material presented here is almost wholly derived from the survey of ULRs described earlier. ULRs, by virtue of their position, location (both geographically and within union structures) and activities are a key source of information in relation to demand for learning in three important regards. Firstly, they have knowledge of current union-led learning activities within Scottish workplaces. Secondly, their direct contact with workers enables them to provide reliable insights into the extent of latent demand for learning, and the factors that would transform latent into actual demand. Thirdly, the activities of ULRs themselves can play a crucial role in stimulating interest in learning and thus generating new demand. A small amount of data included in this chapter is taken from the survey of union officers/union professionals which is discussed fully in chapter five.

The questionnaire was delivered to approximately 200 ULRs across Scotland. Fifty useable responses were received, representing a response rate of 25 per cent.

### Respondent's details

The ULR respondents were employed in, and operating within, establishments in both the public and private sector, although as Table 4.1 shows, respondents from public sector workplaces were significantly over-represented.

**Table 4.1: The sectoral location of ULR respondents (% , number)**

<b>Sector</b>	<b>%</b>	<b>Number</b>
Private	26	13
Public	72	36
Voluntary	0	0
Private and public	2	1
<b>Total</b>	<b>100</b>	<b>50</b>

In terms of industrial sectors, the largest group (33 per cent) were employed in public administration, defence and social security, closely followed by those in transport, storage and distribution (27 per cent). Just over 12 per cent were employed in the wholesale and retail trade. Around 8 per cent were employed in the education, manufacturing and construction sectors, and 4 per cent were in financial intermediation.

Around three quarters of the respondents were employed in organisations employing more than 250 employees, 20 per cent were in organisations employing 51-250 employees, and 4 per cent were in smaller organisations.

While the majority (58 per cent) were employed in the Central Belt, the remaining ULR respondents spanned Scotland in geographical terms.

Table 4.2 below specifies which trade unions are represented in the sample.

**Table 4.2: ULR respondents by union (% , number)**

<b>Union</b>	<b>%</b>	<b>Number</b>
AMICUS	10	5
ASLEF	4	2
CWU	8	4
EIS	6	3
FBU	6	3
GMB	2	1
PCS	28	14
RMT	8	4
TGWU	2	1
TSSA	8	4
UCATT	4	2
UNISON	2	1
USDAW	12	6
<b>Total</b>	<b>100</b>	<b>50</b>

### Current union-led learning activities

According to the ULR respondents, 3,176 employees in total had taken up union-led learning opportunities since 2000. For individual ULRs, the number of learners ranged from 1 to 500, with a mean of 79 over a five-year period. Table 4.3 below indicates the relative presence of occupational groups among current learners to which these learners belong and the mean proportion of learners represented by each occupational group.

**Table 4.3: Occupational group of current learners**

<b>Occupational group</b>	<b>Mean of total learners made up by this occupational group %</b>	<b>Base (number of ULRs)</b>
Managers and Senior Officials	17	5
Professionals	64	5
Associate Professional and Technical	47	8
Administrative and Secretarial	70	14
Skilled Trades	48	11
Personal Service	1	1
Sales and Customer Service	61	10
Process, Plant and Machine Operatives	72	5
Elementary/unskilled	58	11
Other	2	1

For just over a third of ULRs, the learner group they represented was measurably balanced by gender, and the remaining ULRs split fairly evenly between those whose learner groups were largely composed of one gender or the other, as indicated below.

**Table 4.4: Gender of current learners**

<b>Gender</b>	<b>Current learners %</b>	<b>Base (number of ULRs)</b>
All female	2	1
Mainly female	27	12
Equal mix of male and female	36	16
Mainly male	27	12
All male	9	4
<b>Total</b>	<b>100</b>	<b>45</b>

Slightly less than one quarter of the sample (24 per cent) reported that their learner group included ethnic minority workers while around eight per cent reported that some were migrant workers.

In terms of age, 38 per cent of ULRs reported the presence of workers aged under 21 in their learner group (a mean of 22.5 per cent of learners), while 70 per cent reported the presence of workers over 50 (a mean of 40 per cent of learners).

The learner groups were dominated by workers on permanent contracts, either full or part time. Temporary workers were largely absent. This is of particular interest given that the telephone survey results indicated that temporary employment status was a strong indicator of desire to learn. There is a clear gap between the level of desire among temporary workers to engage in learning and their current involvement in workplace learning. Half of the ULRs reported that many learners were shift workers.

The learner groups were fairly evenly split in terms of the types and status of learning undertaken. Fifty four per cent reported that at least half of their learner group had undertaken accredited learning, and 42 per cent said their learners had undertaken non-accredited learning. One quarter (26 per cent) reported job related learning, and just over half (54 per cent) reported learning for personal interest or fulfilment.

### **Future demand for union-led learning**

Just over half of the ULRs were able to estimate the number of employees who wished to undertake union-led learning but had not yet done so. This group identified a mean number of 88 prospective learners, with a range from eight to 800. This figure is significantly higher than for workers currently undertaking learning (mean of 79). If we exclude the highest figure of 800, which was a significant outlier, the mean number of prospective learners is 61. The mode for this question is 30. Each of these figures can be used to estimate the existing demand for learning across the population of ULRs in Scotland. Findlay et al (2006) identified at least 846 ULRs trained as part of SULF projects up to 2005. This figure is used in our analysis, although it is clearly an underestimate as it excludes ULRs who have undertaken induction/learning since and those who have been trained outwith SULF projects (or those who have not been trained at all). Table 4.5 below summarises these calculations:

**Table 4.5: Estimated prospective learners in Scotland**

<b>Measure</b>	<b>Prospective learners</b>	<b>Estimated prospective learners in Scotland [prospective members per ULR multiplied by the number of ULRs (846)]</b>
Mean	88	74,448
Adjusted mean	61	51,606
Mode	30	25,380

There is a strong case for using the adjusted mean as the most reliable estimate of demand for union-led learning in this analysis. The presence of a significant outlier militates against using the unadjusted mean. The concentration of mode responses in one medium sized union detracts from its reliability. On the basis of the adjusted mean, an estimate of current demand for union-led learning (which will exclude a significant number of learners involved in union education) is 51,606. On the basis of these calculations, we are confident that the target set in the feasibility study of 50,000 new learners over ten years is realistic.

ULRs were asked about the direction in which demand for union-led learning was moving. Table 4.6 illustrates their responses, with more than half indicating that such demand was increasing, and only 8 per cent signalling a decrease in demand for union-led learning.

**Table 4.6: Trend in demand for union-led learning as identified by ULRs**

<b>Demand</b>	<b>%</b>
Increasing	52
Staying about the same	40
Decreasing	8
<b>Total</b>	<b>100</b>

We asked respondents if, *given sufficient resources*, they could double, treble or quadruple the number of union members undertaking union-led learning. The majority (57 per cent) indicated that they could double their current numbers; 24 per cent considered that they could treble their current numbers, and 19 per cent indicated that they could quadruple the number of current learners.

Union officers/union professionals reinforced the ULR responses, with four out of eight reporting that their union could double the number of learners given sufficient resources, one indicating that the number could be trebled, and three indicating that the current provision could be quadrupled.

We asked about the composition of the group identified as interested in undertaking learning but having not yet done so. Table 4.7 indicates the estimated mean proportion of each occupational group amongst current and prospective learners as identified by ULRs.

**Table 4.7: Current and prospective learners by occupational group**

<b>Occupational group</b>	<b>Mean estimate of current learners %</b>	<b>Base (number of ULRs)</b>	<b>Mean estimate of prospective learners %</b>	<b>Base (number of ULRs)</b>
Managers and senior officials	17	5	17	10
Professionals	64	5	60	9
Associate professional and technical	47	8	44	7
Administrative and secretarial	70	14	49	20
Skilled trades	48	11	45	11
Personal service	1	1	5	3
Sales and customer service	61	10	70	12
Process, plant and machine operatives	72	5	55	7
Elementary/unskilled	58	11	53	14
Other	2	1	2	1

It is clear that current union-led learning is attracting employees from across the occupational spectrum. This is not surprising, given the emphasis on lifelong learning in Scotland and in public funding for union-led initiatives. What is striking is the extent to which highly skilled and qualified employees participate and are predicted to participate further in future union-led learning. In overall terms, however, both current and prospective union learners are drawn from a wide range of occupations.

ULRs were also asked to consider the gender composition of prospective learners. Table 4.8 compares this to the composition of current learners.

**Table 4.8 Gender composition of current and prospective learners as reported by ULRs**

<b>Gender</b>	<b>Current learners</b>	<b>Prospective learners</b>
	<b>% (ULRs)</b>	<b>% (ULRs)</b>
All female	2	2
Mainly female	27	18
Equal mix of male and female	36	43
Mainly male	27	32
All male	9	5
n	45	44

The data suggests that prospective learner groups are likely to be more evenly gender balanced than current learners.

In terms of the ethnic composition of learners, 36 per cent of ULRs predicted that prospective learners would be drawn from ethnic minority groups, as compared with 24 per cent of ULRs who reported the presence of ethnic minority workers among current learners. The mean proportions cited for current and prospective ethnic minority learners were 12.5 per cent and 10.9 per cent respectively.

The number of ULRs who predicted that new learners would be drawn from migrant workers was twice as high (16 per cent compared with 8 per cent) as the number who reported the presence of migrant workers amongst current learners

Table 4.9 below presents the ULR responses on current and prospective learners by age. These groups are of particular interest in terms of their access to learning, skills and qualifications: under 21s who are in employment are less likely to have undertaken learning after school; while the over 50s are the age group least likely to have undertaken learning in areas such as ICT. Both groups are well represented among both current and prospective learners.



**Table 4.9: Age composition of current and prospective learners as reported by ULRs**

Age group	Mean estimate of current learners %	Base (number of ULRs)	Mean estimate of prospective learners %	Base (number of ULRs)
21 and under	38	19	21	26
50 and over	40	35	34	37

It is clear from the ULR responses that union-led learners are drawn largely from the permanent workforce, either full-time or to a lesser extent part-time. Temporary workers do not feature significantly in ULR reporting of either current learners or prospective learners.

**Table 4.10: Employment status composition of current and prospective learners as reported by ULRs**

Type of employment	Mean estimate of current learners %	Base (number of ULRs)	Mean estimate of prospective learners %	Base (number of ULRs)
Full time permanent	82	38	79	41
Part time permanent	29	20	31	26
Full time temporary	11	2	10	4
Part time temporary	35	3	35	3

Half of ULRs (50%) reported that shift workers participated in learning currently, and slightly more (52%) believed that shift workers were likely to participate in learning in the future. Means of 78 per cent for current learners and 84 per cent for prospective learners suggests that shift workers are accessing union-led learning, although it should be noted that shift working may take a variety of forms and the survey was unspecific on the form of shift working.

ULRs were asked to give some indication of the types of learning that prospective learners might undertake. Table 4.11 below indicates the significance of all forms of learning, whether accredited or non-accredited, job related or personal interest. In terms of job related courses, significantly more ULRs reported the relevance of this to future than to current learners, although the proportions of learners engaged in this activity were predicted to be lower.

**Table 4.11: Type of learning undertaken as reported by ULRs**

<b>Type of learning</b>	<b>Mean estimate of current learners %</b>	<b>Base (number of ULRs)</b>	<b>Mean estimate of prospective learners %</b>	<b>Base (number of ULRs)</b>
Accredited courses	48	27	44	36
Non-accredited courses	62	21	42	25
Job-related courses	48	18	29	24
Personal interest courses	51	27	39	34

While this appears somewhat contradictory, it is worth noting that interest in job-related learning dominated the telephone survey results.

ULR respondents were asked to indicate any factors that they believed would help stimulate further union-led learning. Thirty nine ULRs (78 per cent) responded to this question with over half providing at least three comments. Table 4.9 below summarises the areas covered by the 122 comments contained in the survey.

**Table 4.12: Factors stimulating take up of learning as reported by ULRs**

<b>Comment</b>	<b>Number of responses</b>
Employer recognition/time off to learn	31
Access to learning	24
Funding	23
Awareness of learning opportunities	22
ULR recognition	12
More interaction with colleges	2
Increased staff morale	1
Understand new European laws	1
Peer pressure	1
Childcare provision	1
Fun	1
Self belief	1
Help in starting trade councils	1
Rewards for attainment	1

The most common factors mentioned by respondents included employer recognition of the value of learning and time-off to learn. Respondents indicated that further union-led learning would be stimulated if learning was valued more by employers and if there was more co-operation between employer and union. Other concerns related to the time available to participate in learning. Some respondents felt that in order for this to be achieved there needed to be more flexibility in the workplace in terms of having paid time-off to learn as well as ‘shift friendly’ opportunities.

‘Access to learning’ issues elicited 24 responses with comments that the availability of courses, particularly at a local level or in more rural locations, was limited and that more online learning opportunities might increase union-led learning. As access is an issue, some suggested that more on-site learning facilities or mobile equipment might also be a solution.

‘Awareness of learning’ was also a factor that many respondents raised. Comments indicated that more publicity and advertising of learning opportunities, including examples of the benefits to learning, is required, and that this is best done through a high

profile union campaign and through employers marketing the role of the ULR. Some respondents linked this comment to the need for more awareness and recognition of their role particularly in relation to time off to carry out their duties.

A lack of funding was also identified as a factor that hindered take-up of learning. The respondents indicated that the number of learners would be likely to increase if there were more free or discounted courses available.

### **Summary**

Perhaps the most significant finding from the survey of ULRs is their perception that there is significant latent demand for learning in their workplaces. On the basis of a mean estimate of 61 learners per ULR and the number of ULRs in Scotland, there should be confidence that a target number of 50,000 over ten years (including learners involved in trade union learning) is achievable.

These new learners are, from the ULR responses, likely to be drawn from all occupational categories and be engaged in all types of learning. They will include both men and women workers, workers in the youngest and oldest age groups, and ethnic minority and migrant workers.

The results from the econometric analysis of the telephone survey data (section 3.17) indicate that temporary workers are more likely than permanent workers to express a desire/intent to learn. Yet the data on current learners suggests that temporary workers are not accessing learning in significant numbers. While the relative exclusion of temporary workers from current learning activities may be explicable entirely on the basis of their employment status, it is of some concern that this group of workers' interest in learning is not translating to learning engagement - not least given the likely benefits of enhanced learning for more insecure workers. This would suggest that there may be a problem with the supply of learning to this group rather than a lack of demand.

## **Demand for union education**

### **Background**

Union education refers to the provision of learning services for trade union employees and representatives such as trade union officers/professionals, lay officers, workplace representatives, health and safety representatives and union learning representatives. In Scotland, as elsewhere in Britain, much of this is organised through TUC Education, now encapsulated within unionlearn (formerly the Union Academy), either in terms of generic programmes for trade unionists or tailored programmes for particular trade unions.

In Britain, over 70,000 trade unionists take part in union education activities each year, aimed at building their capacity to understand union policies and priorities, address current workplace and wider social issues, and hence enhance their performance as union employees and/or union representatives within workplaces.<sup>18</sup> As well as furthering union activities, trade union education plays a significant role in engaging and enhancing the skills and qualifications of a wide range of learners, including many non-traditional learners.<sup>19</sup> These learning activities have knock-on effects in personal/domestic, community and political activities.<sup>20</sup>

Since 1996, the TUC Union Representatives Programme has been accredited through the National Open College Network.<sup>21</sup> Current TUC education has union representatives training (Stage 1, Stepping Up, Level 3 Certificate), Health and Safety representatives training (Stage 1, Next Steps and Level 3 Certificate), and Union Learning Representatives training (Initial Training, Additional Modules, Level 3 Award) at its core. In addition, TUC Education provides a variety of specialist and short courses (see Table 5.2 below).

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<sup>18</sup> [www.unionlearn.org.uk/education/learn-77-f0.cfm](http://www.unionlearn.org.uk/education/learn-77-f0.cfm)

<sup>19</sup> Capizzi, 1999

<sup>20</sup> Findlay and McKinlay, 2002.

<sup>21</sup> Capizzi, *op cit.*

Unionlearn's strategic priorities identify a number of areas in which further union education and learning activities are likely, including new online learning opportunities, strategic management and leadership training for unions, continuing professional development (CPD) for union professionals, networks to support union representatives (ULRs in particular), and learning around equalities issues, community cohesion and European and international developments.

In addition to TUC Education, many trade unions have their own education services, with a wide range in terms of the scale of provision. It is much more difficult to ascertain the level of this kind of education activity. Surveys can give some indication of scale: in one survey by the University of North London, out of 35 TUC affiliated unions who responded, 30 ran their own courses, with ten of these training over 1,000 trade unionists a year.<sup>22</sup>

### **Trade union education**

In 2005, 2,262 students took part in union education activities in Scotland organised through TUC Education. These activities are free to learners. The costs of this provision are borne by the Scottish Executive, the Scottish Funding Council and the TUC Educational Trust, with unions paying towards learners' expenses. The quality of provision of union education in terms of learning and teaching processes, learner progress and learner outcomes has been highlighted in recent HMIe reports.<sup>23</sup>

Table 5.1 below illustrates the numbers of people involved in TUC-provided union education in Scotland since 2000. It is estimated that this rate of learning is rising by eight to ten per cent per annum, a rate of increase which is lower than for Britain as a whole,<sup>24</sup> where course enrolments are rising by around 13 per cent.<sup>25</sup> This gives a current figure for 2006 of just under 2,500. However, this is likely to be an underestimate of both

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<sup>22</sup> [www.eiro.eurofound.eu.int/2002/07feature/uk0207104f.html](http://www.eiro.eurofound.eu.int/2002/07feature/uk0207104f.html)

<sup>23</sup> HMIe, 2007. Available at [www.hmie.gov.uk/documents/inspection/StowCollRep.pdf](http://www.hmie.gov.uk/documents/inspection/StowCollRep.pdf)

<sup>24</sup> Interview with Harry Cunningham, TUC Education.

<sup>25</sup> [www.unionlearn.org.uk/about/index/cfm?mins=107](http://www.unionlearn.org.uk/about/index/cfm?mins=107)

the current and latent levels of demand for union education. It underestimates current demand as it excludes provision by unions themselves outside of the auspices of TUC Education. It is also likely that actual demand and latent demand are likely to differ because of the impact of supply restrictions on actual demand – put more simply, more union activists would be involved in union education if there were more resources to provide it. According to the TUC’s Education Officer in Scotland, current provision for union education is barely touching the tip of the iceberg.

**Table 5.1: Numbers involved in union education through TUC Education in Scotland, 2005 and previous 5 years.**

Union workplace representatives: Students										
	Union officials		Safety reps		ULR	ULR modules	Specialist courses	Short Courses	Certified courses	Total
	Stage 1	Stage 2	Stage 1	Stage 2						
2005	161	68	266	89	195	39	--	151	393	2262
2004	240	46	406	183	253	74	--	774	94	2070
2003	228	30	347	239	330	--	48	834	--	2056
2002	198	20	368	133	185	--	--	1031	--	1935
2001	259	84	416	190	6	--	--	1013	--	1968
2000	258	39	429	136	--	--	473	539	--	1874

Table 5.2 below gives further specification of the kinds of areas addressed in short or specialist courses.

**Table 5.2: Types of Short Courses provided by TUC Education in Scotland**

- Union Learning Reps
- ULR Workforce Development Module
- ULR Basic Skills Module
- ULR E-learning & learndirect Module
- ULR Information Advice & Guidance Module
- Industrial Relations/Collective Bargaining
- Health & Safety
- Health & Safety Quarry Industry
- Induction
- Equality
- Skills/Languages
- International Issues
- Pensions
- ICT
- Information & Consultation
- Schools briefings
- Handling Members Problems
- Introduction to Employment Law
- Unison RMS Training
- Unions Tutor Training
- Environmental Course
- TUC Certificate in Occupational Health & Safety
- TUC Certificate in Contemporary Trade Unionism
- TUC Certificate in Employment Law
- Euro Project
- Discipline and grievance
- Violence against staff

TUC Education has invested considerably in e-learning capability and all core courses are now available online. For example, the online learning programme for trade union education at Stow College has recently been commended as an exemplar of innovative practice.<sup>26</sup> Nonetheless, according to their officer in Scotland, TUC Education provision has potential for expansion geographically, in particular to the North East and far north of Scotland, and to the Borders.

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<sup>26</sup>HMIe, 2007 *op cit.*



The priorities of TUC Education provision in Scotland are derived from wider unionlearn priorities and as a response to particular areas of need within trade unions. With most areas of provision there is widespread agreement over the need for it; with others, such as CPD for union professionals, there is greater contention. According to the TUC Education Officer in Scotland, there is significant variation across unions in Scotland in the strategic priority given to union education.

We undertook a survey of union officers/union professionals (UO/UP) in Scotland in order to obtain further information on the current and prospective level of provision of union education within individual unions. Thirty nine surveys were issued to union officers/professionals in STUC affiliated unions and one to the Royal College of Nursing. Eight of these were returned, constituting a response rate of 20 per cent. Together, these unions comprise 20 per cent of STUC's affiliated membership. As the total population for this survey is small, a 20 per cent response rate, while credible, does not produce data capable of quantitative analysis. Thus, the analysis below uses the data in an illustrative rather than a quantitative way.

Those who have responsibility for education within their trade union completed the surveys. Although they were not all education officers, some respondents had held this post for a number of years, with two of them having ten years' experience. Three indicated that they shared this responsibility with a colleague.

The sample included small and large unions with membership numbers ranging from 886 to 77,000 (see Table 5.3 below). One union also included student memberships. This range is reflected in the number of officers, representatives and members who took part in union education, with the most recent recorded annual data showing figures between five and 2,000. Two unions were unable to provide this requested information. Five unions were able to supply recent statistics on the number of members in Scotland who participated in union-led learning. For the unions that did respond, numbers ranged between 11 and 7,000.

**Table 5.3: Union membership**

Union	Membership numbers
1	1,557 (+247 student members)
2	77,000
3	3,000
4	36,000
5	886
6	900
7	37,000
8	2,200

The **UO/UP** respondents were responsible for members across all industrial sectors and from all occupational groups.

Table 5.4 shows the number of people in the sample that undertook trade union education in the most recent year for which annual data is available. Data is presented as a range.

**Table 5.4: Trade union education**

	Number taking part in union education/training (range where applicable)	% Female (range where applicable)	% on TUC accredited courses
Employed union officers/professionals	2-32 (n=5)	20-100% (n=4)	100% (n=2)
Lay branch officers	20-200 (n=3)	3-80% (n=3)	-
Shop stewards	7-1500 (n=5)	24-80% (n=5)	42%, 100% (n=2)
ULRs	4-131 (n=6)	30-100% (n=5)	100% (n=1)
H&S representatives	1-1500 (n=6)	30-80% (n=5)	50%, 100% (n=2)
Pensions representatives or trustees	6 (n=1)	30% (n=1)	-
Equality representatives	50 (n=1)	30% (n=1)	-
Other representatives	-	-	-
Members	10-69 (n=2)	30%, 51% (n=2)	-
Others	-	-	-

The respondents indicated that they engaged in all core representative and officer education. They also identified specific engagement in education on the law, globalisation, bullying, pensions, assertiveness, ULR and IR induction courses and

sector-specific courses.

Respondents were asked if demand for union education within their own union was likely to change over the next one to two years. For each of the three time periods specified, a majority of UO/UP respondents indicated an increase in demand for every category undertaking union education. Only one union reported a slight decrease in union officer/professional education over three to four years, while one other predicted a slight decrease in demand for shop steward education over a five year period.

**Table 5.5: Projected numbers in trade union education in the next 1-2 years**

	Union 1	Union 2	Union 3	Union 4	Union 5	Union 6	Union 7	Union 8
Union officers/professionals	2	60	-	10	4	-	20	4
Lay branch officers	-	400	-	175	-	-	25	2
Shop stewards	5-10	3000	-	175	350	-	200	5
ULRs	10-20	200	-	30	-	20	130	10
H&S representatives	5-10	3000	-	145	-	-	85	5
Pensions reps or trustees	-	150	-	-	-	-	-	1
Equality representatives	-	100	-	-	-	-	-	-
Other representatives	-	-	-	-	-	-	-	-
Members	-	200	-	180	-	-	7000	-
Other	-	-	-	-	-	-	-	-
<b>Total Projected Numbers</b>	22-42	7,010	n/k	715	350	20	7,460	27

We asked respondents to give some indication of any factors that might change the demand for union education in Scotland. The responses are listed in Table 5.6 below.

**Table 5.6: Factors that might lead to change in the demand for trade union education in Scotland and the direction of change**

<b>Factors influencing the demand for trade union education</b>	<b>Increase</b>	<b>Decrease</b>
Where union undertakes training instead of STUC/TUC (ie for ULRs)	✓	
Use of general TUC training in England	✓	
Courses responsive to organising issues	✓	
Development of campaigning courses	✓	
Workplace focused courses	✓	
Mergers/creation of new union	✓	
Membership growth	✓	
Shift to organising approach	✓	
Change of government		✓
De-recognition of major employer		✓
We want our local reps to attend TUC Stage 1 & 2 courses	✓	
Agenda for change and knowledge and skills framework	✓	
Raising awareness of learning rep role	✓	
Some employers becoming very proactive in broader education		✓
Introduction of health care support workers to RCN membership	✓	

Respondents were asked their view about the following statements regarding current learning provision for unions in Scotland. Table 14 shows responses from the eight unions. Data is reported in numbers due to the small sample.

**Table 5.7: Views on current learning provision for unions in Scotland (number of respondents)**

	Strongly agree /agree	Neutral	Disagree /strongly disagree
We are generally happy with the quality of externally provided union education courses	3 3	3	
We have sufficient influence over the content of externally provided union education	2	4	1
We have concerns over the cost of externally provided union education		5	2
Courses are available at times of the year when we need them	2	4	1
The quality of union education courses is highly variable	1	5	
Courses are available at the times of the day that suit our staff, representatives and members	4	2	1
It is difficult to know how to access existing union education courses	1	2	5
We prefer to use in-house rather than external courses for our employed union officers/professionals	3	2	2
We prefer to use in-house rather than external courses for our representatives	5	2	1
External providers are able to deliver courses at locations that suit our staff, representatives and members	2	4	1
Education providers are slow in responding to the changing needs of unions regarding education	2	3	3
Having flexible modes of education delivery (e.g. distance learning, e-learning) is important for our staff, representatives and members	5	3	
Within this union, we know enough about the education marketplace to contract effectively	3	3	2

The data presented in Table 5.7 above indicates a largely positive perception of the availability, quality and costs of union education, and of the degree to which unions are able to influence the content and delivery of courses. This is consistent with the evaluation of the later rounds of SULF (Findlay et al, 2006).

Respondents were also asked to indicate how far they agreed with the statements in Table 5.8 in relation to all union learning provision (including union education) in Scotland.

**Table 5.8: Opinions on all union learning provision in Scotland (number of respondents)**

	Strongly agree /agree	Neutral	Disagree /strongly disagree
By working together, unions could negotiate better arrangements with educational providers	5	2	1
Union education provision is disjointed and could benefit from economies of scale	4	3	1
My union does not need to learn lessons from the involvement of other unions in education and learning		2	6
It would be useful for this union to have approved providers of union education	5	3	
There is unnecessary duplication of effort by unions in accessing education services	4	3	1
Union-led learning in England and Wales is benefiting from having a single union brand in unionlearn		5	1
Unions could deliver many more learners and learning outcomes if public funding for learning was significantly increased	6	2	
We have access to enough information and research on union-led learning to plan this union's learning policy and approach	5	3	
As a union movement, we have little to learn from each other in terms of accessing funding for learning			8
Our union would welcome more cooperation with other unions in relation to learning	6	2	
Our ULRs need to be better supported in their activities	7		
Our learning activities have largely met all existing demand amongst our members	3	1	4
In this union, we are well informed about approaches to union-led learning in other unions	3	2	3
Unions are particularly well placed to encourage significantly more people into learning	8		
Unions have not worked well as a movement to campaign over learning and funding for learning	2	4	1
The current scale of learning activity in this union does not meet the existing demand for learning amongst our members	5	1	2
It would make sense for unions to cooperate to provide support to ULRs	6	2	

It is clear from the responses that union officers believe there is considerable potential for union-led learning to expand, and that current learning activities are not meeting the demand for learning among their membership. It is also clear that union officers can see considerable potential for closer collaboration across the unions on learning activities.

Finally, we asked union officers to identify areas of learning activity and types of learner that they believe should be prioritised. Their responses are contained in the tables below.

**Table 5.9: Type of learning to be prioritised**

Union	Response
1	Union learning representatives training
2	Union organising linked learning
3	Reps training: diversity wise
4	IT, ESOL skills for life, languages
5	Basic reps course.
6	Learning that the member requests, demand led
7	Learning to enable – study skills, self development, etc learning for fun (lifelong learning) IT
8	Business skills

**Table 5.10: Type of learners to be prioritised**

Union	Response
1	ULRs
2	Reps and learning for non-traditional learners
3	N/A
4	Members! Essentially level 1 and 2 learners
5	Local reps. We don't have resources to support a network of Union Learning reps
6	All who show interest
7	Potential learners not currently engaged in development
8	Freelancers

## Summary

There are currently more than 2,200 people involved in union education in Scotland, although there are good reasons to believe that this figure is an underestimate both of actual education activity and demand for union education. A majority of union officers believe this demand is likely to rise in the next few years for a variety of reasons relating to strategic union factors, both internal and external.

While union officers were largely positive in their assessment of the availability, quality and cost of available union education in Scotland, they also identified the potential to expand union education and the role of closer collaboration between unions in both generating and responding to such an expansion.

## **Conclusions**

The evidence contained here is the first comprehensive and formal statistical analysis of demand for union-led learning in Scotland or the UK. The research involved the use of a variety of methodological and data collection approaches. A high degree of consistency of outcome resulted from each of these approaches.

The demand for union-led learning has been estimated from a telephone survey of employees in organisations with a union presence, formal statistical modelling and surveys of ULRs and union officers. This has allowed for a detailed consideration of demand from different groups within the workforce, for different types of learning. It also allows for the possibility that the supply of union-led learning may create its own demand.

In terms of the telephone survey evidence, and even allowing for the cautious approach taken by the research team, there is strong evidence that the figure (from the feasibility study) of 50,000 learners over five years, is, if anything, an underestimate of potential demand.

More than one third (35 per cent) of the sample reported an intention to undertake learning. Extrapolating this figure for the relevant population, this equates to learning demand of just over 400,000. A further 21 per cent of the survey population reported that they may undertake further learning.

Learning aspirations were driven by a range of factors, but were dominated by an interest in progression in one's current job and by an interest in one's career and personal development. Respondents indicated a broad range of learning interests and objectives.

Statistical analysis indicated that a number of factors were of crucial significance in making respondents more likely to undertake learning. These were, in descending order of importance, current level of qualification; involvement of a trade union in the



organisation or provision of learning, and aspirations towards a higher level of income.

The estimate of the logit model (of the probability of having an intention to undertake learning) provides striking evidence that there is a dynamic element in this process that must be taken into account. Specifically, the estimates indicate that the provision or organisation of learning by trade unions may, in itself, generate even more demand for learning than is currently being expressed.

In addition, the estimates also suggest that for a specific group (those in temporary employment) the lack of provision/organisation of learning by unions may be masking a significant degree of demand from this group.

The ULR survey evidence clearly identifies existing demand for learning that has not yet been met. ULRs themselves are confident that the demand for union-led learning is increasing and that, with sufficient resources, they could deliver significantly higher numbers of learners. Even a cautious interpretation of their estimates of unmet demand for workplace learning points to the existence of more than 50,000 prospective learners at the current time.

These learners would be drawn from across all occupational categories; would include a number of otherwise difficult to reach groups (including migrant workers) and would undertake a broad range of learning activities. Any expansion of union-led learning would, of course, place additional learning demands on ULRs themselves and would highlight further the need for support for ULRs from unions and employers.

The survey of union officers, and an analysis of TUC Education activities in Scotland, revealed a growing demand for trade union education. This growing demand takes a variety of forms: numbers involved, expansion of new forms of representation and newly emerging issues facing workers and their unions. There is also potential for geographical expansion of trade union education in Scotland. Union officers indicated that demand for learning amongst their members outstripped their current provision and that, with

additional resources, they could deliver many more learners. Union officers were also very clear about the benefits of closer cooperation across unions in relation to the expansion of union-led learning in Scotland.

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